Most, if not all, organizations imperfectly translate espoused theory into theory-in-practice, and faith communities are no exception (Argyris & Schon, 1974; Reid, 2004). Invitational Leadership Theory (ILT) has been used effectively to help education based organizations reduce this discrepancy, but no research is available which considers ILT within churches (Purkey & Siegel, 2003, Stanley & Purkey, 2005). This qualitative case study documents and analyzes leadership experience and practice through the lens of Invitational Leadership Theory in three Baptist churches affiliated with the Cooperative Baptist Fellowship (CBF).

An initial concept map of ILT identified foundations, assumptions, dimensions, areas, outcomes and conflict management (Purkey, 1991; Purkey & Novak, 1996). These six concepts from previous research were found to be present in the case study, but did not fully capture three issues that were found within the CBF affiliated churches: (a) theological understanding, (b) autonomy of the individual believers and the churches, and (c) positive role instability. The ILT concept map was adapted to better represent Baptist church leadership with the following changes: (a) Theology is included within the Foundations; (b) Priorities and Provisions were added as additional categories in the Areas; (c) the Dimensions were re-categorized, focusing on the intellectual, physical, spiritual and communal aspects of self and others; and (d) Vision and Inspiration replace Intentionality and Optimism in the Assumptions.
Baptist Congregational Leadership: A Case Study of Invitational Practice

by
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A dissertation submitted to the Graduate Faculty of North Carolina State University in partial fulfillment of the requirements for the Degree of Doctor of Education

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DEDICATION

To three of my greatest gifts: Madeline, Alexis and Leah - I dedicate this work to you. May you receive it as a testimony to many things; love, patience, invitation, forgiveness, opportunity, calling, persistence, victory. I ask your grace in the reality that as I seek to understand and teach an invitational life, I often fall short in the practice of it. In all things, in all places, at all times, please know that the three of you bring me greater joy, meaning and fulfillment than I can ever express. I see you as tenacious yet tender, indomitable yet humble, beautiful yet grounded, gifted yet gracious.

In the five years this degree encapsulated, you have become amazing young women. I can hardly wait to see what the future holds for you! I would be minimizing across many realities if I were to say that I am not proud of my new title, but the form I will cherish the most is “Dr. Daddy.” I love you.
BIOGRAPHY

I tend to take a complex perspective of most things: history, choices, and providence have their place in the story that finds me at NC State. I was born in Kentucky, raised in Virginia, and chose North Carolina eight years ago. Retail, banking, and construction functioned as temporary employment over the early years, with church and education settings forming the base for my larger roles: pastor, teacher, minister, and consultant. Organizations are where people come together to realize shared hopes, and I am fascinated by these collections of potential.
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Creator God, Lord Christ, Indwelling Spirit

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LIST OF SYMBOLS OR ABBREVIATIONS

ILT - Invitational Leadership Theory
RSQ – Research Sub-Question
IRB - Internal Review Board
CBF - Cooperative Baptist Fellowship
JITP - Journal of Invitational Theory and Practice
MCSE - Mountain Crest, Sam Edger
MCBP – Mountain, Crest, Bob Pollard
MCBW – Mountain Crest, Ben Wall
HPRA – Highland Park, Roger Alderson
HPSR – Highland Park, Sarah Reed
HPRW – Highland Park, Rhonda Walker
EBJH – Edgetown Baptist, Jimmy Harrow
EBCD – Edgetown Baptist, Corey Dunlevy
EBOS – Edgetown Baptist, Olivia Smith
CHAPTER ONE: INTRODUCTION

“An invitation is … an intentional act designed to offer something beneficial for consideration” (Purkey, 1991, p.2).

In the book of Matthew, Jesus tells a parable about a wedding. In this passage, the invitation gets extended to all who would accept: "Go therefore into the main streets, and invite everyone you find to the wedding banquet. Those slaves went out into the streets and gathered all whom they found, both good and bad, so the wedding hall was filled with guests." (Matthew 22:9-10, NRSV). This story conveys an attitude and practice of invitation with near abandon; not limited to the stuffy guests who are customary attendees, but to all who would accept and respond. It shows Jesus, head of the church, presenting invitation as a gracious model of involvement. Moving from the parable into modern life, the hope for open invitations gets imbedded into organizations that exhibit running tensions. Tensions exist between solidarity and openness, purity and tolerance, those who are “in” and those who are “out” (Graen & Uhl-Bien, 1995). Churches are no exception to the reality of this tension (Reid, 2004). Translating Jesus’ ethos of invitation into the practice of the Christian church has been a challenge for two thousand years.

The purpose of this case study was to broaden the understanding of leadership in Baptist churches, specifically those that affiliate with the Cooperative Baptist Fellowship. While many Baptist churches declare an invitational theology, this ethos is not always realized in the life and practice of the church. Theologian John Stott writes:

there is a paradox at the heart of the church. It is the painful tension between what the church *claims* to be and what it *seems* to be; between the ideal and the human reality;
between romantic talk about ‘the bride of Christ’ and the very unromantic, ugly, unholy and quarrelsome Christian community we know ourselves to be. It is the tension between our final, glorious destiny in heaven and our present, very inglorious performance on earth. This is the ambiguity of the church. (Stott, 2002, p.17)

Findings from this study are intended to help the church understand leadership in a way that brings their intentions and their practice together.

The paradox and ambiguity in church life is shared across different roles of church leadership, including vocational and volunteer positions. This study centers around the idea of invitation as it is experienced by vocational and volunteer Baptist church leaders. These leaders participate in churches which affiliate with a common, larger, mission organization that shares several philosophical understandings with Invitational Leadership Theory. Invitation stands in contrast to telling, directing, or coercing human decisions and behavior. Therefore these leaders would be the embodiment of an invitational component to their organizations. As such, the leader’s voices are key to the research (Patton, 2002).

While many theories of leadership abound in the scholarly and practitioner literature, only one overtly contains a foundation of invitation (Kouzes & Posner, 2007; Ott, Parks, & Simpson, 2003; Northouse, 2007; Purkey & Stanley, 1991). William Purkey began this work in the late 1960’s. In 1988, Invitational Theory was more formalized in a work coauthored with John Novak. Purkey broadened the Invitational Theory audience from educators to general leadership with Betty Siegel in their 2003 work Becoming an Invitational Leader.

In a summary of Invitational Theory research produced in 2005, three professional groups provided the majority of settings for its assessment: education, counseling, and human
services (Stanley & Purkey, 2005). Of the three professional settings, most of the research has been conducted in the school setting (Purkey, personal correspondence, 2010). Counselors have researched beyond the school setting in only two studies; one within hospitals and one centered in the nuclear family. Another study went beyond the confines of a traditional school, addressing social workers under a human services heading. These research summaries demonstrate that this theory has not been formally extended to churches in general or Baptist churches in particular. This limited exploration of Invitational Theory is not due to a perceived lack of usefulness in other settings, as Dr. Purkey notes the theory’s “applicability to houses of worship” (Personal correspondence, 2009). This dissertation intends to address this gap in the literature, providing a broad understanding of how invitation may be embodied in Baptist leadership practices.

**Setting**

This study was conducted across three churches which affiliate with the Cooperative Baptist Fellowship (CBF). Leader experiences across these churches, and the degree to which ILT is reflected in those experiences, formed the study’s purpose. It is important to note that Baptists are not a creedal denomination, having no single document to which each must ascribe (Pinson, 2010). However, there are clarifying values that help define priorities, values, and beliefs as they organize collective efforts for missions, evangelism, and education. As part of the founding documents in 1991, the CBF espoused four core values of: (a) soul competency, (b) church freedom, (c) Bible freedom, and (d) religious freedom (CBF FAQ, 2003; CBF Who We Are, 2012). These core beliefs of the CBF undergird the freedom of interpretation and involvement understood to be the right and responsibility of the
individual believer, the individual churches, and the collection of churches. These freedoms by definition allow for involvement at all levels by open invitation rather than by mandate or obligation.

As there is no single document that all Baptist churches must ascribe to, specific clarifying statements from the CBF organization aid in recognizing components that are held in common with ILT. Consider the following statement concerning education, from the CBF Founding Document, which distinguishes their intent from fundamentalist approaches:

Fundamentalists educate by indoctrination. They have the truth and all the truth. As they see it, their job is to pass along the truth they have. They must not change it. They are certain that their understandings of the truth are correct, complete and to be adopted by others. Moderates, too, are concerned with truth, but we do not claim a monopoly. We seek to enlarge and build upon such truth as we have. The task of education is to take the past and review it, even criticize it. We work to give our children a larger understanding of spiritual and physical reality. We know we will always live in faith; our understandings will not be complete until we get to heaven and are loosed from the limitations of our mortality and sin. (2003)

This approach to education, and the understanding of truth behind it, acknowledges a philosophical stance of limited understanding as a potentiality for individuals and organizations within the work of the CBF.

There are two disciplines that undergird this study, education and theology. The discipline of education provides the research foundation of the study, and the discipline of theology provides the contextual cues inherent in the identified research setting. Education
and theology encompass a broad range of the human experience, and have historically held a
high view of the individuals that make up the corporate whole. The concept of invitation is
relevant to both disciplines because they each encompass the engagement of people and
ideas, culture and practice, community and self while honoring a fundamental freedom to
personhood (Purkey & Siegel, 2003).

The discipline of education provides the scholarly foundation for this study. Learning
theories from the field of adult education, like experiential learning theory, transformative
learning theory, and spiritual learning theory have influenced religious organizations in their
work of soul edification. Historic and modern technological innovations, such as the printing
press and computers, have impacted the work of educating the gathered church in many of
the same ways that general education made use of these tools. The Baptist tradition over the
last two hundred years has been overt in its desire to utilize strong educative practices to
strengthen its people: Sunday School for general Bible knowledge, deacon training for
leadership and care giving, Sunbeams and Royal Ambassadors for missions awareness, and
Vacation Bible School are all examples of how education is brought into actual Baptist
practice (Encyclopedia of Southern Baptists, 1958). Lest Christian education be perceived as
just for children, Discipleship Training, Leadership Education, small group Bible studies, one
on one mentoring, didactic retreats, worship services and sermons reach into the lives of
adults.

The discipline of theology provides the context for this educational study. Invitational
theology is a term used to describe part of an ongoing debate between two schools of
thought. Calvinism, so named from the work of John Calvin, holds that God has chosen those
who would be eternally connected with the Godhead before the beginning of the world.

Arminianism, named from Jacobus Arminius, holds that God invited relationship with humans and they must respond in faith to receive this grace. It is this capacity for response, based in free will, which credits humans with choice and autonomy (Wesley, 1872). Some great church leaders have taken a middle ground, holding God’s choice and human choice in healthy tension. C.H. Spurgeon, the most published Baptist preacher of all time, “never fled from the seeming incompatibility of the Sovereignty of God and the responsibility of man to repentance. When challenged to do so he replied, ‘I do not try to reconcile friends’”(Drummond, 1991; Fritzius, 2009). As invitational theology values freedom of response, both accepting or rejecting, it therefore leans to an Arminian understanding of human capacity.

Personal perspective

As a fourth generation Baptist minister, I have seen the struggles that congregations can experience while trying to embody invitational theology. Leading this type of organization can be difficult and has unique challenges when compared with other organizations. Clergy and lay leaders strive to engage people at the most significant level of spiritual and practical depth, while honoring their personhood and autonomy.

My interest in invitational leadership is rooted in a sense of calling around two passages in the Christian Bible. The first has been introduced at the beginning of this chapter, and recounts an open invitation to a wedding banquet from the book of Matthew. The second passage is often referred to as the Great Commission. Matthew concludes his account of the life and ministry of Jesus of Nazareth by recording the command to “go and make disciples
of all nations” (NIV). This passage takes the New Testament’s exposition of what a person is
*to be*, and adds a perspective of what *to do*. This term of “disciples” can also be translated
from the Greek as “learners”. Making *learners* is often called discipleship, and can be
grouped among five principle functions of the church: fellowship, discipleship, worship,
service, and evangelism (Warren, 1995). It is therefore possible to embrace discipleship as
both a process and description – to both “be” and “do” learning. With this desired outcome,
the Christian church embodies this learning ethos.

Considering the Christian’s commission to “go and make *learners* of all nations” may
be helpful in a modern society that is jaded to the purposes of the church. A commonly held
perception of those outside the church is that church history merely reflects human power
struggles, rather than the work of a loving God. Many of those who are cynical of the church
might accuse the church in practice of making *clones* rather than *learners*, and that it seeks to
indoctrinate rather than open the eyes of followers to the God/human possibilities. The
pabulum of similitude is not the core manifestation of discipleship, and cloning does not
describe the fullness of experience when spiritual matters are involved. One need only to
look at the wide range of personalities, backgrounds, and behaviors represented in the
original associates of Jesus to confirm that diversity was part and parcel of life with Jesus. I
feel especially called to the role of helping believers, and nonbelievers alike, to be more
prescient as both intentional and serendipitous learners.

I have been interested in organizational change and leadership since I was young.
Leading organizations started in earnest in high school, when I became drum major of the
marching band. Leader positions that stretched my understanding and skill set during my
college years included section leader in a three hundred member college marching band, school project teams, Bible study groups, and positions within the Baptist Student Union. I went through seminary leading youth and adult volunteers. Later I led local and state level organizations in my role as a pastor. These experiences kept me asking, in practice and in theory, “What is the best way to come together as people gathered around a common task or idea, to fulfill our purpose?” “How should I use power?” and “Is there a point when invitation is not enough?” “How should organizational belief actually work its way out in practice?” These questions hold valid across secular and faith oriented organizations, but it is my intention to address them within the Christian faith.

A majority of my adult life has been in service to, and participation with, the organized Christian church, specifically within the Baptist tradition. It is my belief that the church plays an essential role in the individual and collective lives of not only the participants, but for society as a whole. While it may be argued that the balance of positive and negative impacts on society over the millennia has sometimes swung towards the destructive side, the beneficial aspects of grace, compassion, human rights, justice, and morality that are central to a Christian worldview continue to fuel our societal development.

All organizations have priorities, goals, shared values, norms and desired impacts. These communal understandings frequently begin as ideas, but they find their way into resource decisions, policy structures, internal language and other elements of organizational culture. Theories of leadership, organization, and group life can highlight components that should not be left out while guiding and strengthening ongoing group life. Yet, even with theories to guide them, organizations are living entities, resistant to static interpretations of
how ideals make their way into actual practice. Our theories need to be actively assessed for them to remain helpful and informative.

**Background**

Like many secular and religious volunteer organizations, the Christian church faces ambiguity, opportunities, and challenges in modern times (Reid, 2004). There are some ideals at work in Baptist churches located in North America that align with cultural norms, such as a democratic polity. In contrast, there are some ideals that may challenge the norms of the wider society such as how power is wielded, and a divine understanding of accountability. Leading a mostly volunteer organization within a culture that both embraces and separates the church from the mainstream requires specific knowledge, skills, settings, attitudes, and beliefs, as well as practice, practice, practice. Documenting leader experience can help the church understand how to balance opportunity and realistic limits in an effort to make tangible the intentions of the Biblical narratives.

As the church strives to accomplish its purpose, it is relevant to note that the external view of its role in society is always undergoing adjustment. While a majority of U.S. citizens still self identify themselves as Christians, some believe the current influence of the Christian church on society is diminishing (Meacham, 2009). Dr. Curtis Freeman, director of the Baptist House of Studies within Duke University’s Divinity School, calls this trend the “disestablishment of American Religion” (Freeman, 2011). Freeman notes that since 1975: 1) Protestant affiliation dropped from 62% to 52% of the U.S. population, 2) Mainline Protestant denominations dropped from 24% to 14%, 3) Weekly church attendance declined from 43% to 38%, and 4) The number of Americans claiming no religious affiliation has
nearly doubled since 1990, rising from 8% to 15% (Freeman, 2011). As the church seeks to define and enact its purposes and mission, the larger context of current trends and culture cannot be dismissed.

A more internal struggle for clarity among Baptists is how leaders are to make use of power. Many Baptist churches espouse a theology that posits individual freedom in a co-creative reality with God. For congregations connected with the CBF, these are often expressed as soul freedom, church freedom, Bible freedom and religious freedom (Shurden, 1993; CBF FAQ, 2003). This perspective allows for an interaction of choice, power, and benefit on the part of the individual, and the divine. This interaction often leads to practical tension in the manifestations and practical outcomes of organizational structures, expectations, relationships, and most importantly, leadership. Similar to all democratically based groups, balance can be challenging around issues like freedom and accountability, individual and collective rights, purity and diversity. These tensions shape the organizations in ways that have immediate impact, and across generations.

Internal and external struggles for clarity have resulted in a dis-connection of belief and practice. John Stott was earlier quoted using terms such as paradox, tension, and ambiguity between “the ideal and the human…community we know ourselves to be” (Stott, 2002, p. 17). Argyris and Schon also describe this gap using the terms of ‘espoused theory’, and ‘theory-in-practice’ (Argyris & Schon, 1974). My research and ministerial experience indicate that this gap between theory and practice puts the church’s message at risk, as “incongruity invalidates” (Vella, 2007, p.14). Two examples are provided here to contextualize incongruity within the church.
The first example of incongruity involves the concept of participation due to a *calling*. “Calling” finds similar use in the church community to Purkey’s use of “invitation” in the school community. Calling is an understanding that you have been specifically asked to participate in a given mission, action, or cause (Ingram, 1985). Calling can be attributed to a divine, personal, or congregational source. With freedom as a common ground, both calling and invitation are clarification of intent which leaves the power to accept or refuse with the recipient. However, church health consultant Doug Murren wrote about guilt based engagement occurring where engagement based in a sense of calling was espoused:

> Sometimes we build our volunteer workforce and income base using guilt, probably because we know the ranks of church volunteers are the most susceptible to guilt. We talk about how the children will be left unattended and eventually dislike church. We have long left the sense of calling in our requirements to serve. We have forgotten that without a calling most things are better left undone in our churches. (Murren, 2009, p.3)

Murren posits that even with a strong background of calling, there is often the experience where church leaders lead by fiat or manipulation. Without this calling to specific causes, the collective church is drawn into a negative emotional state characterized by fear.

A second example of incongruity may be drawn from the Baptist worship practice of the altar call, commonly referred to as ‘the invitation.’ Citing evidence the practice is well over one hundred and seventy years old, church historian Bill Leonard describes the invitation as “an opportunity of public response to a personal understanding of God’s call on one’s life” (Biblical Recorder, 1998). In many churches, this time is available to respond to
invitations on several levels, to join the church as a member, to commit or re-dedicate one’s life to the Lordship of Christ, or even express outward acceptance of spiritual grace and blessing. Despite practicing this open and public invitation, the church often hears stories of participants feelings invalidated, left out, dismissed, or disrespected. One may be welcomed at the altar call only to be shunned in the social milieu of the congregation.

**Statement of the Problem**

The problem this study addressed is that while churches affiliated with the Cooperative Baptist Fellowship espouse an invitational mission, sometimes there is a disconnect between what is espoused and how it is lived within the churches. This study was undertaken to document leader experience within churches that espouse an invitational theology, and to assess Invitational Leadership Theory as a tool to incorporate an invitational theology into the expectations and practice of leadership. ILT contends that effective invitations are the key idea that allows participants to merge individual capacity and free will to the existing realities of a given situation. Offered and accepted invitations across time are what embeds this respect into the practical life, or ‘culture’ of an organization (Purkey, 1999). Invitational Leadership Theory had never been assessed for relevance in the life and work of Baptist churches. ILT is a potential resource for leaders to reduce the theory to praxis gap, even when leadership expectations are complex. But, ILT has not been assessed within churches. Understanding, defining, teaching, and implementing effective leadership is important. Incongruous practices that do not match espoused beliefs foster ongoing confusion around the development of leaders and the engagement of followers within the church. This brings us to the purpose of the study.
Purpose of the Study

The purpose of this study has been to broaden and document the understanding of leadership in Baptist churches, and to assess the degree to which Invitational Leadership Theory reflects that understanding. This research forms the basis for a framework to better assist the church to consistently remain invitational and avoid elements of dis-invitation, reducing discrepancy between their espoused theory and their theory in use. As ministers and lay leaders strive to lead in conjunction with their values and priorities, this study may help them utilize appreciative tactics in working with congregants and the broader public.

Invitational Leadership has been developed within the culture of K-12 and higher education in response to similar struggles described for the church. ILT offers a systemic structure that highlights the interplay between physical space, relationships, beliefs, goals and processes. The world of education and the environment of the church share intentions of developing involved persons, and furthering the collective effort, thus making solutions developed in education as viable options to inform ongoing work in the church. Invitational Education has been studied extensively within public K-12, and higher education settings (Purkey, 1991; Stanley & Purkey, 2005). Purkey and Siegel expanded the intended settings of Invitational Education under the more generalized nomenclature of “Invitational Leadership Theory” (Purkey & Siegel, 2003). However, little research has been done beyond schools, with minor exceptions in the counseling and health vocations (Stanley & Purkey, 2005). One recent study forms a nominal bridge from the educational setting to the setting of the church. Published by Steyn, this study assessed invitational education in a Christian school, which has many of the underlying beliefs and structures often associated with a
church. This research bridge is incomplete, as the study remained in K-12 educative setting, not the actual congregation that supported the school (Steyn, 2007).

It was anticipated that Cooperative Baptist Church participants would relate a commitment to invitational theology, and a concomitant struggle to implement that approach in certain areas of church life. Insufficient documentation of the valued components and perceptions of the people currently in church leadership stands as an impediment to the full realization of effective leadership training and development. Comprehensive theoretical structures, similar to what Invitational Education offers to school settings, may prove valuable to the efforts of church leaders. While there are leadership studies of the church available, they fail to include invitation as a focal point of engagement.

This research documents leader’s experiences within a case study of Cooperative Baptist Fellowship affiliated churches. Semi-structured interviews were used to gather perspective from select leaders within three Baptist churches, with on site participant observation complementing the interviews for data collection. Assessment of Invitational Leadership Theory as a tool for understanding the church environment, and improving its practical application of espoused beliefs was based in this data.

Research Questions

The primary research question for this study was:

- What does leadership look like through the lens of Invitational Leadership Theory in three Cooperative Baptist Fellowship affiliated churches?
The following research sub-questions, listed in Table 1, correlate with the main categories from Invitational Leadership Theory. These questions open each aspect of the theory for specific exploration within the experience of Baptist church leaders.

Table 1:
Research Sub-Questions

1. What foundational concepts undergird leadership within a Baptist church? (Foundations)
2. What are the core values/elements/assumptions necessary for Baptist leadership? (Assumptions)
3. How are leaders developed? (Dimensions)
4. To what extent do Invitational Leadership Theory areas reflect how Invitational Leadership Theory is lived within the organization? (Areas)
5. What are some outcomes of church leadership, both good and bad? (Levels and Products)
6. How are problems identified and dealt with in the work of the church? (Conflict resolution, the Six “C’s”)  

The six sub-questions in Table 1, above, correlate to a conceptual map of Invitational Leadership Theory found in Figure 1, below, and repeated for convenience as Appendix N. The questions are cross referenced within the conceptual map by markers in the following form: “RSQ1”, “RSQ2”, etc.
<table>
<thead>
<tr>
<th>RSQ2: Assumptions</th>
<th>RSQ3: Dimensions</th>
<th>RSQ4: Areas</th>
<th>RSQ5: 4+Levels and 2 Products=Outcomes</th>
<th>RSQ6: Six</th>
</tr>
</thead>
<tbody>
<tr>
<td>“C’s”</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trust</td>
<td>Self Personally</td>
<td>People</td>
<td>The Plus Factor</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1988</td>
<td>1988</td>
<td>1990 &amp; 1991 only</td>
<td></td>
</tr>
<tr>
<td>Respect</td>
<td>Others Personally</td>
<td>Places</td>
<td>Level IV</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1988</td>
<td>1988</td>
<td>Intentionally Inviting</td>
<td></td>
</tr>
<tr>
<td>Optimism</td>
<td>Self Professionally</td>
<td>Policies</td>
<td>Level III</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1988</td>
<td>1988</td>
<td>Unintentionally Inviting</td>
<td></td>
</tr>
<tr>
<td>Intentionality</td>
<td>Others Professionally</td>
<td>Programs</td>
<td>Level II</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1988</td>
<td>1988</td>
<td>Unintentionally Disinviting</td>
<td></td>
</tr>
<tr>
<td>Care</td>
<td>Process</td>
<td>Process</td>
<td>Level I</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2005</td>
<td>1990</td>
<td>Intentionally Disinviting</td>
<td></td>
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</tbody>
</table>

**Figure 1: Invitational Leadership Theory overview, with dates of earliest inclusion in literature.**

(Adapted from Purkey, 1991; Purkey & Novak, 1996)
Significance of the Study

This study contributes to the practice and theory of leadership by establishing value in the participant’s capacity for choice and engagement. Samuel Butler said, “He that complies against his will, is of his own opinion still” (Patterson, 2002). The full capacity of individuals and teams is realized when their own needs and motivations are voluntarily yoked to the common purposes the organizations espouse. One hundred years has passed since John Dewey wrote, “it is absurd to suppose a person gets more intellectual or mental discipline when he or she goes at a matter unwillingly than when he or she goes at it out of fullness of heart” (1912). Yet, organizations continue to struggle with engaging the whole person. Leaders in higher education, non-profits, churches, corporations, and government stand to benefit from a broader understanding of invitation as the basis for organizational culture. It is the difference between diplomacy and force. It is the difference in democracy and autocracy. It is the difference between imposition and collaboration. It is the difference between impoverished management and team management (Northouse, 2007).

Context affects leadership. By studying Invitational Leadership Theory in a new context, the church has been given a new way to understand and foster the development of its people and organization. In addition, ILT itself has been changed through this application in a new context. This research presents discoveries related to components, categories, priorities, and even nomenclature. All groups and organizations which hold aspirations for a stronger and more humane world, not just churches, can use this work to better understand their situation and how ILT relates. Invitations are an important matter, from small and frequent interactions that might be called social graces, all the way to large world view
perspectives on the order of religious affiliation. A fuller understanding of context can maximize the theory and practice of invitation.

Finally, this study contributes a research-based analysis tool that will allow churches and church leaders to understand and assess their organizations more effectively (Appendix N). This understanding will allow leaders in a Baptist church setting to be better able to avoid the pitfalls of dis-invitation and retain an inviting stance for Christian discipleship.

Incorporating ILT in new settings, with greater relevance, continues to develop.

Recommendations for future research are identified to further develop these tools.

**Limitations**

Four limitations were identified at the beginning of this qualitative study. First, due to resources and time constraints, the study was limited in terms of site and participant selection. The three research sites represented a limited geographic area, and a single external missions and support group, the CBF. Additional Baptist groups, other denominations, and even a fuller geographic sampling of churches found in the national organization of Cooperative Baptist Fellowship would generate a more complete assessment of ILT in churches. Further reduction within the sample resulted from limited numbers of interviewees. The full range of data that would come from interviewing every church member, regular attendee, and visitor was not possible for this study. Even further removed, but still impacting church life, are the infrequent, disgruntled, and even former members who were not included in this study. Future studies can corroborate or expand the findings of this case study based in a wider audience.
Second, using ILT’s categories and structures as a structure for the Research Sub-Questions may have limited a complete discovery of church life and the leadership elements that influence that communal experience. The interview guide was in part built around the sub-questions, and may potentially limit the data received. Bracketing, journaling and reflective participant researcher activities were utilized to increase objectivity during in vivo coding.

Third, this study is limited in vocabulary, as it bridges a Christian community and a potential secular audience. Minimizing jargon is intended to increase readability and usability, but may leave out important nuances for the community it is intended to document. Discovering language and expectations of those involved in church life through a qualitative approach is understood to reduce this limitation.

Fourth, aspects of my own experience as a fourth generation ordained Baptist minister were a potential limitation. Prior experience within a given setting can foster assumptions and tacit knowledge that are not made explicit in the research or findings of a study. Personal interest can also promote the ideal version of a relationship or organization and hamper the full exposition of the real workings. An ongoing researcher log, member checking of interviewees, quotes from the documents and artifacts under study and extensive coding across multiple constructs were utilized to alleviate this limitation.

**Chapter Summary and Conclusion**

This chapter has provided the statement of the research problem, the purpose of the research, the research questions, theoretical foundations and information about the research context. Functionally connecting espoused theory to theory in praxis is a problem for most
organizations, and churches are no exception. Invitational Theory has contributed to the field of education in this regard, but has not been assessed in churches (Egley, 2003; Stanley & Purkey, 2005). The principle of invitation rings true of theological principles found in Baptist churches, justifying further exploration of ILT in this context. This study fills a gap in the literature by extending ILT research beyond the institutions for public education, such as K-12 and higher education. The purpose of this study was to document leadership experience across three Baptist churches, assessing the level to which ILT is reflected in the experiences and practice of leadership. The primary research question, “What does leadership look like through the lens of Invitational Leadership Theory in three Cooperative Baptist Fellowship affiliated churches?”, informed the methodological choices which addressed the overall purpose.

Chapter Two presents a review of literature across three areas to address the problem and purpose of this study. Chapter Two begins with a detailed review of ILT components, preparing for assessment of its presence, saturation, and applicability for the church. Next, a broader look at leadership theory contextualizes ILT among several understandings of leadership, spanning leader, follower, and contextual based theories. The third section of Chapter Two clarifies the church as an education system, which connects the prevailing context of existing ILT research to this particular study.

Chapter Three presents the methodological approach for this study; a qualitative multi-site case study. Chapter Four presents constructed narratives and a descriptive case overview. Chapter Five presents identified themes, topics, and examples from the case which
relate to the conceptual map of ILT. Chapter Six provides discussion, conclusions, and recommendations for future research.
CHAPTER TWO: LITERATURE REVIEW

It is imperative for a strong qualitative research study to have a broad and meaningful literature review. Creswell summarizes three key purposes as “(a) It shares with the reader the results of other studies...(b) It relates a study to the larger, ongoing dialogue…and (c) It provides a framework for establishing the importance of the study” (1994, p. 21). This chapter will address Creswell’s purposes in three sections. The first section will provide a robust overview of Invitational Leadership Theory that will structure the data collection and findings. The second section is a review of other leadership theories. This section will demonstrate the progression of theory from viewing leaders as singular entities, through relational and situational determinants, to more systemic understandings of engagement and leadership. The third literature section reviews the church as a comprehensive system of learning, acknowledging an ongoing praxis. With awareness of the issues and goals for the church, proper perspective on the educative aspects of the church and the development, or lack thereof, of its leaders will be addressed.

Invitational Leadership Theory

Purkey and Stanley describe invitational education as “unlike any other model” in that it “addresses the global nature of schools, the entire gestalt…Its goal is to create a total school environment that intentionally summons people in schools to realize their relatively boundless potential in all areas of worthwhile human endeavor” (1991, p. 15). While the terms of systems theory are not specifically used, it is comprehensive in the same manner. Invitational Leadership can be characterized as a combination of leader, follower, transactional, setting, and outcome focused theories.
Current Invitational Leadership Theory has roots that extend into a rich body of literature and practice. William Watson Purkey explored educational effectiveness as early as 1968 under the specific heading of an invitational process (1991). Subsequently presented as Invitational Learning (Purkey, 1990), Invitational Education (Purkey, 1991), and Invitational Living (Purkey, 1991), Invitational Leadership culminates this earlier work (Purkey & Siegel, 2003). Figure 1 (repeated as Appendix N) is of utmost importance for the reader of this study to understand, and it is highly recommended that it be referenced again. This graphic offers a visual concept map likely to aid the reader in understanding the broad sweep and development of this theory across the six main categories of Foundations, Assumptions, Dimensions, Areas, Outcomes and Conflict. These six categories were used to frame the six research sub questions for this study.

Development of the Invitational Leadership as a theory spans many decades, evidenced by the included dates of Figure 1 and Appendix N. Even as ILT benefits from ongoing development, it reflects a consistent application of the principle that “human potential, while not [always] apparent, is there waiting to be discovered and invited forth” (Purkey & Schmidt, 1990, p.102). There is no implication that living, learning, and leading by invitation is easy, but instead, that it is worthwhile. In clarifying that “invitations are not accidents, they are choices”, ILT challenges both leaders, and followers, to offer and accept invitations that shape the environs in which they find themselves (Purkey & Siegel, 2003, p.153).
Foundations of ILT.

Self Concept Theory, the Perceptual Tradition, Democratic Ethos and the goal of Educational Living form the foundation for current ILT writings. As early as 1970, Purkey was publishing on the topic of self-concept in relation to educational outcomes, and it remains one of the foundations of Invitational Leadership Theory. Giving priority to the way people think, and especially how they think about themselves, points the observer beyond simple behaviorist conclusions. In broad social endeavors such as living together, working together, education, counseling and the helping professions, for both the leaders and those being led, Invitational Theory as Purkey defines it recognizes the importance of how individuals view themselves in the world (Purkey, 1970).

Further, self-concept theory “gives primary importance to a person’s perceived world, rather than to objective reality” (Purkey, 1970). A clarifying example of perception over objective reality, even though not found in Purkey’s work, is the situation of anorexia nervosa. In this condition the patient perceives that they are overweight, even when objective reality demonstrates that the person’s very life is threatened by lack of nutrition. The importance of self concept influences every interaction and every capability. Indeed, “once we have acquired an idea about ourselves, it serves to edit all incoming information and to influence our future performance” (Purkey, 1970). Citing the widely recognized work of Mead, Lewin, Goldstein, Maslow, and Rogers, Purkey contends that to influence learning and leadership, it is important to construct an environment facilitating a positive self concept (Purkey, 1990).
The second foundation of ILT, is that of the perceptual tradition. Self concept is how individuals view themselves, and perceptual tradition addresses how the individual sees the world in the immediate present. So there is a wedding of how one views the self and the world to form and justify action. The following quote contrasts this idea with Freudian and Skinnerian alternatives:

A Freudian might say that people behave as they do because of internal dynamics of the unconscious. A behaviorist would emphasize the influence of environmental stimuli that preceded or followed a particular behavior. In contrast with these approaches, the perceptual tradition maintains that people do what they do because of how they perceive the world at the moment of behaving. (Purkey & Novak, 1988)

Novak clarifies two additional foundations in 2005 that have been functionally present for thirty years. One is ILT’s commitment to the democratic ideal and its predicating beliefs that all people are worthy, motivated, and capable, is unshakable throughout Invitation Theory history. The second is the commitment to a learning stance throughout all of life. His summary of all four foundations follows:

- Self-concept theory – a viewpoint based in the perceptual tradition that all people are internally motivated to maintain, protect and enhance their perception of who they are and how they fit into the world.

- The perceptual tradition – a psychological perspective that takes seriously the democratic ethos by focusing on how things are seen from the point of view of the person.
- Democratic ethos – an ethical and political commitment to the idea that all people matter and have a right to participate meaningfully in the rules that regulate their lives.
- The goal of educational living – an ideal that aims to have people able to savour, understand and better more of their individual and collective experiences. (Novak, 2005, p. 45)

These four foundations clarify a level of social interaction that is concerned less with the senses and more with the meaning making that occurs within and around learners and leaders (Purkey & Siegel, 2003). With these concepts in mind, the structural components of Invitation Leadership Theory, shown as vertical columns in Figure 1 and Appendix N, are to be considered next.

**Assumptions: TRIO & Caring.**

There are four assumptions that have been part of Invitational Theory since at least 1988. These four have been alternatively been labeled elements, fundamental values, and principles across the years (Purkey & Novak, 1988; Purkey, 1991; Purkey, 1999; Purkey & Siegel, 2003). These four assumptions are pivotal in that they give “purpose and direction” to Invitational Theory (Purkey & Aspy, 2003). In the early years, the four were proposed with a catchy acrostic of TRIO to aid in remembering Trust, Respect, Intentionality, and Optimism (Purkey & Novak, 1988). While the acrostic was eventually dropped, the four assumptions were basically left intact in all the primary print publications through the year 2003. One more assumption has been added through the website for the International Alliance for
Invitational Education; it is the assumption of Caring (*International alliance for invitational education home page*).

- Trust - Having confidence in the abilities, integrity, and responsibilities of ourselves and others.
- Optimism - The belief that people possess untapped potential in all areas of human endeavor.
- Intentionality - To act…with purpose, to act with an aim.
- Respect - The belief that we and our associates are able, valuable, and responsible, and should be treated accordingly. (Purkey & Siegel, 2003)
- Care - The ongoing desire to link significant personal means with worthwhile societal ends. (International Alliance for Invitational Education, 2008)

**Dimensions: Four Corner Press.**

This category, labeled Dimensions in Figure 1 and Appendix N, is the only category for which the content has not changed since it was first introduced by Purkey. The name has not been as stable as the content, however. Originally introduced as the “Invitational Quotient” (Purkey & Novak, 1988), later proposed as the “Four Corner Press” (Purkey, 1990) (Purkey & Siegel, 2003), the name that has stuck is “Dimensions” (Purkey, 1991). The Four Corner Press title was included in the latest book, justified under the realization that these “continuously compete for time and energy” (Purkey & Siegel, 2003). The Four Corners, or Dimensions, that consistently press on the leader are:

- Being personally inviting with oneself.
- Being personally inviting with others.
• Being professionally inviting with oneself.

• Being professionally inviting with others (Purkey & Siegel, 2003).

**Areas: The four “P”s that become “The Five Powerful “P”s”.**

This is a very tangible section of Invitational Theory. The four original “P’s” were Places, Policies, Programs and People (Purkey & Novak, 1988). Process shows up as the fifth “P” in 1990 (Purkey). The Five P’s are frequently taught using a five tentacle starfish as a metaphor, with each tentacle being necessary to accomplish the starfish’s goal. The Five “P’s” set a context for the tangible application, they are the where, of Invitational Theory.

Invitational Theory is intent on producing a functional and productive system. Purkey often presents this with some descriptive humor, reminding the reader that “an organization is like a big bowl of Jello – you poke it anywhere and the whole thing jiggles” (Purkey, 1990). The Five P’s intend to capture the whole entity where learning and leadership take place. There really is not a separation of the people from the places in which they live and work. Invitational Theory makes it a point that expectations, and how people are perceiving their environment, are predictors and facilitators to individual and collective success. The policies are integral to the programs, the processes are hampered if in discord with aesthetics. It is important to assess the “look and feel” of a place, the types of rules and how they are enforced. “In creating and maintaining an invitational ecosystem, everything counts” (Purkey & Siegel, 2003, p.103).

**Outcomes: Levels and Products.**

In 1981, Jack Murphy and William Purkey began to write together about Invitational Education. In the article: “Invitational Engineering in the Residence Halls,” Purkey and
Murphy do not address the *architectural* engineering of the residence halls per se, but rather the intention behind the structures and meaning of the *social* setting in the residence halls (Purkey & Murphy, 1981). Purkey and Murphy drew attention not to the physical structures in their own right, but their relational and social outcomes produced. As they explored outcomes, several levels of effectiveness became apparent in regard to the practice of invitation. The four levels of invitation shown in Table 2 summarize this important interpretation of actual experience.

Table 2
*Four levels of Invitation*

<table>
<thead>
<tr>
<th>Level 1: Intentionally disinviting;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 2: Unintentionally Disinviting;</td>
</tr>
<tr>
<td>Level 3: Unintentionally inviting; and</td>
</tr>
<tr>
<td>Level 4: Intentionally inviting</td>
</tr>
</tbody>
</table>

(Purkey & Murphy, 1981).

An additional idea, the “Plus Factor”, was added in two writings in 1990 and 1991 but was soon dropped from further iterations. This “Plus Factor” was intended to describe mastery of the four levels and a full integration of intentional invitations into the “stance” of the individual (Purkey, 1990; Purkey & Stanley, 1991). Purkey promotes the initial four levels as the basis for professional functioning for over twenty five subsequent years. It is important to note that Purkey does not dismiss the complexities of human interaction, writing “everyone functions at each level from time to time” (Purkey, 1991). However, through all of his
writings, he highlights the settings and expectations that consistently bring forth intentional invitations as a desired outcome.

The concept of ‘Products’ is only addressed overtly in two works, but it speaks to one of the overall goals of Invitational Theory (Purkey, 1991; Purkey & Siegel, 2003). This overall goal is to make the world a better place for everyone involved, and the structures enacted lead to building or destroying human capacity. It is quite simple, but when tied with scalable concepts like the Four Levels, it is intended to show that the more consistently a leader, parent, or educator can function at the Intentionally Inviting level, the outcomes will enhance life rather than reduce it. For the purpose of this research, ‘Products’ and ‘Levels’ will be subsumed under the common heading of ‘Outcomes’.

**Conflict management: Five “C’s” that became the Six “C’s”**.

There is no avoiding conflict in our world. Inevitably, something goes wrong, someone gets hurt, or participants or leaders will not graciously contribute. The Five “C’s” that were introduced as part of the theory in 1991 by Purkey and Stanley are Concern, Confer, Consult, Confront, and Combat. These five are important to keep in a certain order since they are intended to be methods of resolution graded from least invasive to more invasive. “The rule is to employ, whenever possible, the lowest “C” level first, and the move upward toward higher Cs only as necessary...[the] first thought should be: ‘How can I successfully manage this situation at the lowest possible level’?” (Purkey & Novak, 1996, p. 24-25). The principle of these first five C levels is to respond appropriately to a given situation. Participants risk needlessly escalating negative emotions and impact should they
respond too aggressively, and conversely risk loss of integrity should they fail to address legitimate problems. This list provides a guide for scaled response in difficult situations.

Conciliate, the sixth C, was added in 1996, in a work authored by Purkey and Novak called *An Invitational Approach to Conflict Management*. This is a notable addition, as it speaks to the comprehensive nature of the environment and perceptions of those involved in any social arrangement. We started this section by saying that conflict was unavoidable – so what do you do after it shows up? Forgiveness, or starting again, might be another way to characterize this ‘C’. It speaks to the necessity that connections are not to be so easily severed by strife. Indeed, there must be a ‘next step’ after trouble, and invitational leaders “attempt to operate from a framework that emphasizes imaginative acts of hope” (Purkey & Novak, 1996).

**Leadership Theory Overview**

Invitational Leadership Theory is not the first, or only leadership theory. In fact, the concept of leadership within organizations is one that has been approached in many ways, including behaviorally, emotionally, relationally, and structurally. Comte’s positivism would espouse a purely empirical understanding of ideas, including leadership. Schon considers a positivist, ‘one definition fits all’ explanation of leadership misleading (1983). Graen and Uhl-Bien lean away from positivist expectations as they state, “Despite many years of leadership research and thousands of studies, we still do not have a clear understanding of what leadership is and how it can be achieved” (1995, p. 220). Inevitable exceptions arise with a singular definition of leadership, therefore a more postpositive approach may be needed. Consider Peter Senge’s subtitle for his book *The Fifth Discipline: The Art and*
Practice of The Learning Organization. (underline added for emphasis, 1990). Goleman also moves away from ‘logic only’ descriptions of leadership, making use of the term “mystery” in relating leadership expectations (2000). Kouzes and Posner define the leader through descriptions; as one who is credible, direction oriented, conveys an attractive image of the future and is believable (Kouzes & Posner, 2007). Purkey draws his defining statement of leadership from Marv Levy, “Leadership is the ability to get other people to get the best out of themselves. It is manifested by getting them not to follow you, but to join you” (Purkey & Siegel, 2003). These definitions of the role, and the people in that role, are not perfect, but they set a broad understanding for the leader to be standard bearer, facilitator, and creator of an organization’s purpose, goals, and outcomes.

Table 3, below, is based on the table of contents from Peter Northouse’s Leadership: Theory and Practice textbook, and will outline the discussion of general leadership theory (2010). The first six categories of research focus are presented to show a progression which moved theoretical leverage points from the designated leader, to the follower, through transactional, environmental, and outcome based priorities. Northouse does not group the table of contents this way, but Table 3 consolidates the opening dialogue found in descriptive chapters. Category seven, systems perspective, is not included by Northouse, but concludes this list to demonstrate a comprehensive approach that enjoins previous theories. These theories need not be viewed as competitors with each other, but possibly as developmental extensions drawn from real world experience. As such, many of these categories overlap with other categories, and valid arguments could be made to group the included theories
differently. The current grouping offers thematic background specifically relevant to Invitational Leadership Theory.

Table 3  
*Leadership Theory Categories*

<table>
<thead>
<tr>
<th>Category</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Leader focused:</td>
<td>Trait, Skills, Style</td>
</tr>
<tr>
<td>2. Follower focused:</td>
<td>Servant, Transformational</td>
</tr>
<tr>
<td>3. Leader/Follower focused:</td>
<td>The Five Practices of Exemplary Leadership</td>
</tr>
<tr>
<td>4. Transactional (engagement <em>between</em> leader and follower) focused</td>
<td>Leader Member Exchange Theory</td>
</tr>
<tr>
<td>5. Cultural / Environment focused</td>
<td>Contingency, Situational</td>
</tr>
<tr>
<td>6. Outcome Focused</td>
<td>Path – Goal</td>
</tr>
<tr>
<td>7. Systems focus</td>
<td>Family Systems Theory</td>
</tr>
</tbody>
</table>

(Adapted from Northouse, 2010; Kouzes and Posner, 2008)

**Leader focused.**

Trait theories have actually been a strong point for leadership theory research for a large part of this century. Trait theory considers the most important aspects of leadership to be held within the person and character of the leader. This “personality attribute or a way of interacting with others…is characteristic of the person rather than of the situation” (Fiedler and Chemers, in Ott, et.al., 2003, p. 31). If they have charisma, intelligence, good looks, or some other specific trait, the leader will be effective in their setting. Some have identified these traits as “innate”, which precludes the possibility of acquiring the necessary attributes if
they are not already present, not by adaptation, learning, or will (Northouse, 2010, p. 15). This idea is not foreign to Biblical scholars, as seen in the selection of Saul to be king - in part because he physically stood “a head taller than his peers” (1 Samuel 10:23, NIV).

The second leader-centered perspective concerns itself with the skills held by leaders. Kouzes and Posner describe this understanding of leadership when they define leadership as “an observable set of skills and abilities that are useful whether one is in the executive suite or on the front line” (2002, p. 388, italics added). Problem-solving, social judgment and knowledge are three core skills identified by Mumford, Zaccaro, Harding, Jacobs and Fleishman (2000). Katz groups skills as either technical, human, or conceptual, and begins to hint at a situational perspective by writing that these different skill groups are needed at differing levels depending on the job at hand (1955). While still leader centered, skills theory allows for development of a leader beyond trait theory’s expectation of predetermined or innate traits (Kouzes & Posner, 2007).

The third leader focused theory is concerned with the particular way, or style, leaders engage their setting. With style theory, researchers look for certain patterns of behavior exhibited by the leader. Like trait theory, style theory ascribes leadership effectiveness to an inherent aspect of the leader. Lewin, Lippitt and White were looking at effectiveness through the leader style as far back as 1939 from a social psychology standpoint. Their emphasis was on how a supervisor’s style affected group productivity (Ott, et.al., 2003). More recent studies have been done that delineate key constructs of leadership style and correlate different styles with positive outcomes (Goleman, 2000; Yukl & Tracey, 1992; French & Raven, 1959). Below, Table 4 lists the findings of three different style theories.
Table 4  
*Style Delineations For Three Theorists*

1. Coercive, Authoritarian, Affiliative, Democratic, Pace Setting, Coaching  
   (Goleman, 2000).

2. Pressure, Rational persuasion, Consultation, Coalition, Personal appeal, Exchange,  
   Legitimating, Ingratiation, Inspirational appeal (Yukl & Tracey, 1992).


The research summarized in Table 4 also presented correlations between styles and outcomes; both perceived and tangible. Perceived outcomes can run the range of emotional well being, happiness, trust, ongoing support. Tangible outcomes can be typified as absenteeism, numerical growth, average tenure, and Likert style range reports. However, none of them speak to the option of using invitation specifically in the interaction process with those being led. Invitation could be used to effect change, or as a part of ongoing maintenance and management within an organization, relationship, or even the self (Purkey & Siegel, 2003).

**Follower focused.**

Theorists that were not satisfied with attributing outcomes only to the designated leaders have looked at the other side of the engagement: followers. Servant leadership and transformational leadership are theories that look intently, even primarily, at the needs and capacities of the followers involved. This follower focus includes moral obligations to the followers, meaning making for all involved, and a full recognition of a follower’s freedom (Greenleaf, 1991).
As a proponent of transformational engagement, Mezirow brings the integrity of the follower to the forefront, as they must reconcile their personal views and their setting. If part of a leader’s role is to effect and promote change, then the leader must incorporate this need for integrity within the follower, framing their involvement. The leader then builds a response by “the process of using a prior interpretation to construe a new or a revised interpretation of the meaning of one’s experience in order to guide future action” (Mezirow, 2000, p. 5). It is therefore essential for the leader’s own functioning to engage the history and connection with the follower, which allow for making meaning of the surrounding world. A shift in meaning perspective that happens suddenly is termed epochal, while a slower alteration is put in the scope of ‘meaning schemes’ (Mezirow 2000). Transformational theory begins to shift the mechanisms of change, often radical change, to a follower centric model (Ott, et.al., 2003). Robert Greenleaf introduces servant leadership by the statement that

_the great leader is seen as servant first…_It begins with the natural feeling that one wants to serve, to serve _first_. Then conscious choice brings one to aspire to lead. That person is sharply different from one who is _leader_ first, who is driven, perhaps, by the need to assuage an unusual power drive or to acquire material possessions. For such it will be a later choice to serve-after leadership is established… The difference manifests itself in the care taken by the servant-first to make sure that other people’s highest priority needs are being served. The best test…is: Do those served…become healthier, wiser, freer, more autonomous, more likely themselves to become servants? And, what is the effect on the least privileged in society; will they benefit, or, at least, not be further deprived? (1977, p.7, 13-14)
Follower focused theories, exemplified by Mezirow and Greenleaf, move attention away from the designated leader, to those who are engaged and participating.

**Leader and follower focused.**

Kouzes and Posner present a model in the *The Leadership Challenge* that is attentive to leaders and followers, with some focus on the interaction between them. Called the Five Practices of Exemplary Leadership, they include: 1. Model the way, 2. Inspire a shared vision, 3. Challenge the process, 4. Enable others to act, and 5. Encourage the heart (2002). The third practice, challenge the process, includes situational terminology that hints of environment focused models, and even ILT’s Area called Process. However, this model blends leader and follower focused models, without full inclusion of situation and environmental realities.

On the leader side of the model, a list is presented of characteristics of admired leaders. The list was generated by distributing a questionnaire and asking “respondents to select seven qualities that they ‘most look for and admire in a leader, someone whose direction they would willingly follow.’ We tell them that the key word in this question is *willingly*” (Kouzes and Posner, 2002, p. 24). Table 5 presents the results of their research, with the characteristics listed with highest response rates first.
### Table 5
**Characteristics of Admired Leaders**

- Honest
- Forward Looking
- Competent
- Inspiring
- Intelligent
- Fair minded
- Broad minded
- Supportive
- Straightforward
- Dependable
- Cooperative
- Determined
- Imaginative
- Ambitious
- Courageous
- Caring
- Mature
- Loyal
- Self controlled
- Independent

(Kouzes and Posner, 2002, p.25)

These characteristics take the identified leader as the focus, as does the practice ‘Model the way.’ The follower based understanding is most evident in those practices that use ‘inspire’, ‘enable’ and ‘encourage’ as descriptors of success for the positional leader. This model does not look at the actual interchange the way transactional theories do, but some of the same interpersonal dynamics are involved. ‘Challenge the process’ is also interesting in light of this literature review, as it acknowledges setting, but describes an action for leaders to do, more than any objective look or method to assess processes, as the Areas category in ILT does. Kouzes and Posner’s Five Practices take a follower and leader perspective, but it would
be interesting for them to balance their list of admired leadership characteristics with a list of admired follower characteristics.

### Transactional.

Transactional theories look at the actual interchange between, or relationship between, the leaders and the led; the roles and set of functions that develop from an interaction between two or more people (Ott, et.al., 2003). Leader-Member Exchange Theory, or LMX, is a prominent example of this way of looking at leadership. LMX is an outgrowth of a previous theory called vertical dyad linkage, or VDL. The term *vertical dyad linkage* was originally coined by Graen and Cashman to describe the one to one connection that occurs in social encounters (Burns & Otte, 1999). This focus on the dynamic between two individuals is what defines transactional theories. When looking at leadership, the interaction of one leader between multiple subjects will vary. Variations in trust and ability cause each one-to-one relationship to be unique. This model considers the behavioral transactions that occur between the leader and the led to define the critical elements of leadership.

### Setting and environment focused.

Work in the field of organizational culture includes Edgar Schein’s *Organizational Culture and Leadership* (2004), and Peter Senge’s *The Fifth Discipline* (1990). These theorists posit that there is a profound intertwining between the leader and the contextual culture that determine success or failure. Significant contributions by Hersey and Blanchard, Mary Parker Follett, as well as Tannenbaum and Schmidt take culture and environment and move them to the fore of leadership understanding (Ott, et.al., 2003). Typifying this view,
“Situational Leadership Theory suggests that leaders emerge as a result of place, time, and circumstance” (Burns & Otte, 1999). From this standpoint, leadership draws many, if not all, of its cues from the situation itself. No particular style or trait on the leader side, or needs on the follower side, will be adequate for success over time. Multiple skills, abilities, styles and needs on the part of the leader, and the followers will all be tempered by the demands of the current situation.

**Outcome focused.**

One theory that takes generated outcomes as a primary element is called Path-Goal Theory. “The stated goal of this leadership theory is to enhance employee performance and employee satisfaction by focusing on employee motivation” (Northouse, 2010, p. 125, italics added). Path-goal theory shares three basic assumptions with expectancy theory: 1) subordinates will be motivated if they think they are capable of performing their work, 2) if they believe their efforts will result in a certain outcome, and 3) if they believe that the payoffs for doing their work are worthwhile (Northouse, 2010). These three key areas guide the intentions of the leaders as they interact with the followers, with everything building towards a desired outcome. Oversimplified, this focus allows for an element of ‘the end justifies the means’ approach.

**System focused.**

This literature review demonstrates that there are many factors that are considered influential to the dynamics of leadership; leaders, followers, the interchanges between leaders and followers, situations, organizational and societal settings, and the outcomes they all generate. Because of this multi-layered complexity, the language and concepts from systems
Theorists can guide the comprehensive approach to documenting and assessing leadership within churches. Bierema writes:

Systems thinkers ask more and different questions than nonsystems thinkers. Rather than breaking problems down into their smallest pieces by asking "What or who caused this?" they will ask, “Is there a pattern of behavior?” "Does the pattern change over time?" "What are all other variables (including emotions)?" "What factors influence the variables?" and "What are the interrelationships?" Systems thinkers do not find satisfaction in problem diagnosis alone because this would be single-loop learning. Rather, they are interested in the patterns of behavior and other variables that caused the problem and in creating long-term changes that permanently prevent the problem in the future. (2003, p.32)

Bierema draws our focus to that of interrelatedness, a picture that will only be accurate when complexity is acknowledged. When complexity is present, simplistic, single loop learning and leading will not be productive (Argyris, 1991).

The field of systems thinking experienced a surge of interest during the 1990’s among academics, practitioners, and consultants in several disciplines (Barton, Emery, Flood, Selsky, & Wolstenholme, 2004, p. 3). Table 6 offers a comparison of common terms and interests for systemic and non-systemic thinking.
Table 6
Comparison of systems and non-systems approach

<table>
<thead>
<tr>
<th>No.</th>
<th>Systems/systemic/holistic thinking</th>
<th>Unsystemic/traditional thinking</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Interdependence, relations, interconnectedness, openness</td>
<td>Independence, dependence, closeness</td>
</tr>
<tr>
<td>2</td>
<td>Complexity (and complicatedness)</td>
<td>Simplicity, or complexity alone</td>
</tr>
<tr>
<td>3</td>
<td>Attractors</td>
<td>No influential forces, but isolation</td>
</tr>
<tr>
<td>4</td>
<td>Emergence</td>
<td>No process of making new attributes</td>
</tr>
<tr>
<td>5</td>
<td>Synergy, system, synthesis</td>
<td>No new attributes resulting from relations</td>
</tr>
<tr>
<td>6</td>
<td>Whole and holism, big picture</td>
<td>Parts and partial attributes only, analysis</td>
</tr>
<tr>
<td>7</td>
<td>Networking, interaction, interplay</td>
<td>No mutual influences</td>
</tr>
</tbody>
</table>

(Mulej, Bastic, Belak, Knez-Riedl, Pivka, Potocan,…& Zenko, 2003, p. 75)

Barton, et. al., acknowledge that the point of systems thinking is to be inclusive of more than one simple explanation or causal factor in a given situation (2004). Even with this broad understanding of experience and influence, they note the issues of power, choice, and the need to be aware of our own limitations in assessing influence:

By generating a partial and temporary point of view, or an “action area” in management terms, we are in effect identifying clients, the beneficiaries, as those who are in the spotlight. Clearly, not everyone is spotlighted and a beneficiary. Right from the outset then, we see that if this argument that I have been working through holds, then we must recognize that the fundamental issue raised by critical systemic thinking is one of an ethical nature. This is a main distinction between soft systems thinking and critical systemic thinking. That is, critical systemic thinking recognizes
that we are choosing who is inside our boundaries of thinking and who will benefit, and who is outside and thus will not. (Barton, et.al. 2004, p.13)

The boundaries of influence and understanding is a living and dynamic tension within many churches. There is always a pull toward inward, spiritual forms of discipleship, as well as outward, social forms of discipleship. Systems theory will not allow us to focus solely on one side of this discipleship equation. Finitude requires our own delineation of an “action area”, but acknowledgement of a larger whole is necessitated to choose the smaller area with the greatest effectiveness.

Bowen Family Systems Theory is one example of a systemic approach to church leadership. This body of work found acceptance within many ecclesiastical bodies during the same period of surging interest identified by Barton et. al. (Kerr, 1988). Dr. Murray Bowen worked with schizophrenic patients at the National Institute of Mental Health in the 1960’s and 1970’s. From individual schizophrenic patients, the scope of his studies expanded to include whole family systems (Kerr, 1988). He discovered consistent multigenerational connections across whole family units that were explanatory and consistent with the individuals with whom he worked. These connections were often strongest in the emotional functioning of that individual, and were connected to the functioning of the family as a whole. As Bowen’s work began to gain internal consistency regarding families with a schizophrenic member, “what became apparent was that the relationship processes that had been observed in families with a schizophrenic member were present in all families” (Kerr, 1988, p. 40). Gilbert delineates these processes as: (a) Nuclear Family Emotion; (b) The
Differentiation of Self; (c) Triangle; (d) Cutoff; (e) Family Projection Process; (f) Multigenerational Transmission Process; and (g) Sibling Position (1996).

Dr. Edwin Friedman extended Family Systems Theory to worshipping communities, both Jewish and Christian (Friedman, 1985). One connection is that the emotional reality for an individual is influenced by a larger system of relationships and emotions. This emotional connectedness spans individuals, families, and society, which includes organizations (Gilbert, 1992). Considering leadership and change, it is pivotal to note that “the family is a system in that a change in the functioning of one family member is automatically followed by a compensatory change in another family member” (Bowen, 1974). This domino like connectedness yields a give and take of emotion than can even be passed on across generations (Friedman, 1985).

In summary of this leadership theory overview, a developmental shift in focus among existing leadership theories has been presented. This section started with the initial focus of the designated leader, shifting to the followers, the interchange, the culture, outcomes, and finally a nearly all inclusive systems theory approach. These theories indicate validity of leadership components as well as a need to acknowledge that the total is more than its parts.

The Church as a Learning System

In a passage often referred to as “The Great Commission”, Jesus commands his followers to “go and make disciples of all nations…teaching them…” (Matthew 28:19-20, New International Version). The Greek to English translation of μαθητευσατε, here brought over as “disciples”, can also be translated as “learners” (Skinner, 1984). Coming at the conclusion of the earthly life and ministry of Jesus of Nazareth, it is the apostle Matthew who
records this directive. It should not be overlooked that the name of the author, Matthew, is a transliteration of the Greek verb matheteuo, which denotes a scholar, a pupil or an apprentice (Skinner, 1984).

On the obverse of the learning coin, contemporaries of Jesus referred to him as “rabbi”, which is translated as “teacher” (Matthew 26:49, Mark 9:5, NIV). As Jesus repeatedly invited those who followed or inquired about him to “come, follow me”, we see an expectation to be learners as well as make learners (Matthew 4:19, NIV). With a call to be both teachers and learners, an expectation of a learning system is established. A summary of some relevant adult learning theory will follow a discussion of purpose and context for the Christian church.

**Purpose of the church as learning system.**

Making meaning in the lives of followers centers McKenzie’s purposes for adult religious education (1986). The three areas he elucidates are: “to help individuals acquire meaning; to explore and to expand on this meaning; and to express meaning in a productive manner” (McKenzie, 1986, p. 10). Other authors such as Daloz (1986) and Mezirow (1991) frame this process of meaning making within a critical approach which both assesses and prioritizes past experience. Speaking to a Program Planning class at North Carolina State University, Dr. Ed Boone posited meaning as more than knowledge in the strictly cognitive sense. To Boone, meaning is an incorporation and application of ideas. Dr. Boone stated that in the course of his own career development, he progressed from “empowering, training, clarifying objectives, and conveying knowledge” to a place where he could allow “meaning”
to surface in the lives of volunteers with whom he was working (Boone, EAC 703, February 20, 2008).

In clarifying the church’s purpose as meaning making, does the source of this meaning lie within the participant, the Godhead, or elsewhere? And what is the source of this meaning? Some view meaning as generated within the individual, as “many philosophers reject the idea of any form of cosmic meaning imposed on us by some external force…In their view, if life has meaning, then we must create our own through being rather than having” (Naylor, Willimon, & Naylor, 1994, p. 23). The participants in J.J. Fleming’s 2005 dissertation found external connections essential for making meaning, they found it “impossible to separate their spirituality from their daily practice…(with) a deeply personal search for meaning grounded in a web of connection with a Higher Being, with other people, and with all of creation” (p. 132). Involvement and connection appear essential to a meaningful engagement of religious educators who find themselves both participant and facilitator.

Having addressed emotion within the previous section on systems theory, the religious educator may find it compelling that Parker Palmer raises emotion to a singular level of importance for teaching and learning that may speak to the church as a whole (1998). In speaking to the concept of fear in our “culture… institutions… students… ourselves” that cuts us off from “everything”, Palmer stresses that “the only path I know that might take us in that direction [of transcending fear and reconnecting with reality] is the one marked ‘spiritual’”(p. 57).
Contemporary setting and issues.

The Christian church faces challenges in modern times that are not unique to history. Definition in connection to the larger culture, self definition through metaphors, and three praxis issues will form the basis of this section on contemporary settings and issues. This first issue concerns how the church is viewed and valued in the larger setting of community and culture. While a majority of U.S. citizens still self-identify themselves as Christians, the overall influence of the Christian church on the broader culture is widely believed to be going down (Meacheam, 2009). The larger context of culture cannot be totally dismissed as the church seeks to define and enact its purposes and mission.

Douglas John Hall considers questions from a Canadian perspective raised in the wake of perceived diminishing cultural influence of the church (1989). Hall surmises the recent societal setting of the organized church as one with reduced or nonexistent support from both governmental and popular tolerances. Invoking the idea of the church as diaspora (scattered), rather than institutional, he opens the possibilities of positive change, stating “There is a very special invitation to discipleship in these events and changes!” (Hall, 1989, p.55, italics added). In this less hospitable setting, organized religion can return to its foundations of discipleship (learning) through invitation.

Second, consider how the church has self defined through metaphors. When individuals come together as an organization there are often metaphors that describe how they function. Gareth Morgan proposes that organizations can be viewed as a machine, a biological organism, a brain, a culture, a political system, a psychic prison, a flux and transformation, and an instrument of domination (1997). The experienced church participant,
layperson or clergy, will likely identify with several of these metaphors. The Christian New Testament uses biological metaphors [the human body (Romans 12:5, NIV), a vine and its branches (John 15:1, NIV)] alongside relational images [bride (John 3:29) and servant (Matthew 10:24)] to describe the Kingdom of God. These metaphors and images share with modern systems thinking a refusal to isolate components from their setting.

The three praxis issues that relate to the current environment of church practice are 1) the rejection of dualism, 2) power, and 3) fundamentalism. These issues are especially relevant in an environment that values choice and equanimity in process. As we consider the roles of teacher and learner, leader and follower, we do well to draw from Bandura’s discomfort with dualism (1999). In reframing a potentially dualistic understanding of teacher and learner, we need to acknowledge that we are all in learning roles along the way, even when situationally recognized as a teacher. Teaching and learning, leading and following, are not to be seen as diametrically opposed ends of one conceptual line, but integrated realities of experience that complement each other reciprocally.

Second, a struggle for clarity in modern times for the Baptist church is how leaders make use of power in the actual living out of its calling. Many Baptist churches espouse a theology that posits the individual, and the collective church, in a co-creative relationship with God (T. Graves, personal communication, 1989). Practical tensions arise in co-creative endeavors around organizational structures, expectations, relationships, and leadership that impact the present and future generations. Critical Theory reminds us to think objectively about how and why power is used, as it is a useful and appropriate tool that need not bring with it the limits of extremism (Cervero & Wilson, 2006).
Third, fundamentalism can influence modern Baptist leadership. Fundamentalism is more than holding to a core set of positions in faith and belief. It is often affiliated with a deep hubris in the outlook that everything relevant is already known. Bateson writes: “the rise of fundamentalism within any tradition is always a symptom of the unwillingness to try to sustain joint performances across disparate codes – or, to put it differently, to live in ambiguity, a life that requires constant learning” (1994, p. 13.) This “unwillingness…to live..a life [of] constant learning” appears across ideological camps. English and Gillen claim both liberal [new age] and conservative [fundamentalist] extremes deny the ongoing role of learning and the possibility for new meanings and understandings of life, faith and community (2000). Further, English and Gillen cite four primary failures of both new age and fundamentalist faith expressions: 1. serious examination of critical issues, 2. willingness to validate difference, 3. an appreciation for individuality that is in creative tension with the collective, and 4. ability to support the adult learner in a search for meaning (2000).

**Adult education and relevant adult learning theories.**

To discuss adult education, and theories that stem from it, the definition of an adult may be helpful. Defining adulthood, especially when thinking from an educative framework, can prove problematic: sometimes age, developmental issues, or experiential patterns matter, whereas, sometimes it is physical, intellectual, spiritual and emotional capacity that bound adulthood (Merriam, et.al., 2007).

John Dewey and Edward Lindeman set the stage in the early 1900’s for much of what later became known as the field of adult education (Garrison & Archer, 2000; Brookfield, 1987). Dewey’s foundational ideas on education included the belief that “education means
the enterprise of supplying the conditions which insure growth, or adequacy of life, irrespective of age” (1916, p. 51). Lindeman presented four assumptions regarding adult education:

1. education is life – not a mere preparation for an unknown kind of future living
2. education’s purpose is to “put meaning into the whole of life”
3. the approach to adult education will be via the route of situations, not subjects
4. the resource of highest value in adult education is the learners experience (1926).

Allowing for the ambiguous boundaries of adulthood, and a broad historical underpinning offered for the academic field of adult education, five specific theories relevant to the church are worthy of note. These five are spiritual learning theory, transformational learning theory, experiential learning theory, social learning theory and emotional learning theory.

**Spiritual learning theory.**

While there is little difference in the common usage of the terms ‘religion’ and ‘spirituality’ within the church, there is a strong distinction made in the adult education literature between religion and spirituality. As Tisdell writes “Religion is an organized community of faith that has written doctrine and codes of regulatory behavior. Spirituality, however, is more personal belief and experience of a divine spirit or higher purpose, about how we construct meaning, and what we individually and communally experience and attend to and honor as sacred in our lives” (2003, p. 29). Tisdell goes on to postulate seven assumptions about the nature of spirituality, they are:

1. Spirituality and religion are not the same…
2. Spirituality is about an awareness and honoring of wholeness and the interconnectedness of all things…

3. Spirituality is fundamentally about meaning-making.

4. Spirituality is always present (though often unacknowledged) in the learning environment.

5. Spiritual development constitutes moving toward greater authenticity or to a more authentic self.

6. Spirituality is about how people construct knowledge through largely unconscious and symbolic processes, often made more concrete in art forms such as music art, image, symbol, and ritual which are manifested culturally.

7. Spiritual experiences most often happen by surprise. (2003)

Beyond mainline Christian denominations, there are a plethora of beliefs about personal and corporate spirituality. For example, Benally writes of four forms of spiritual knowledge from the Navajo tradition, citing 1) character development, 2) self reliance, 3) emotional ties and relationships across family, community, nation, and 4) reverence and respect for nature (1992). All four of these have a place in mainline Christian expression, but there is a significantly stronger emphasis on nature and balance within the Navajo spirituality than the average Christian church.

*Transformational theory.*

No theological base for an understanding of learning theory should leave out the idea of Transformational Learning. One of the most widely known scripture verses from the Christian Bible is from John 3:16. This verse is part of a story where Jesus claims that one
must be “born again” (John 3:3, New International Version). Transformational theory was addressed earlier to demonstrate the progression of leadership theory to value the followers; it is noteworthy in this section to highlight its interest in profound personal and organizational change (Mezirow, 1991). Transformational learning concerns itself with more than superficial thoughts or observable behaviors, but rather, it distinguishes change at a core level across character, personality and values.

**Experiential learning theory.**

Experiential learning in the church setting can be a profound way to influence discipleship. As Tara Fenwick (2003) expresses “Learning is rooted in the situation in which the person participates, not in the head of that person as intellectual concepts produced by reflection” (p. 25). This type of learning might be central with those who have actually served or participated on a mission field, in a worship service, or in a classroom. The experience is key to the learning. Planning, thinking, reflection, or the behaviors that may be affiliated with them are often superfluous to simply being engaged.

**Social learning theory.**

Social Cognitive Theory, originally presented as Social Learning Theory, discusses many issues relevant to the church and its leadership: modeling, fortuity, social influence, agency, fundamentalism, and power (Bandura, 2004). To illustrate New Testament parallels, look first at modeling in Jesus’ example from John 13:15, “For I have set you an example that you should do as I have done to you” (NIV). Fortuity is seen in the passage where Christ asks in Luke 13:4, “What about those eighteen people in Siloam who were killed when the tower fell on them? Do you suppose this proves that they were worse than all the other
people living in Jerusalem?” Social learning is evidenced in the narratives where one person asks a question in a shared environment (Matthew 21:24, Luke 5:6). Agency is exhibited when Jesus gives people he meets a choice, with their own setting and will involved to decide their next actions, responses, or beliefs (Matthew 19:22, Mark 8:30).

**Emotional and affective learning.**

There is a notable lack of emotional consideration in leadership theory, which is not quite so deficient in education theories. Carolyn Ellis takes the position that “I assume that some experiences can be understood only when feelings are a significant part of the research process” (1993, p. 724). Garrison and Archer write “those who are successful in facilitating learning accept the fact that learners prize their feelings and opinions” (2000). When betrayal, fear, or distrust enters the picture, a leader’s options can become severely limited.

Emotions can become an asset in non-formal settings. Issues such as time constraints, novelty, and free choice, all tend to give non-formal adult education unique challenges as compared to settings such as work or academic institutions (Taylor, 2008). Churches function as non-formal settings where the “learner has the choice to attend or not attend (physically and mentally)” which “demands that the non-formal educator provide an educational experience that captures the learner’s attention so they choose to attend” (Taylor, 2008, p. 83). Taylor claims that modeling positive feelings can increase the attention of adults, and thereby foster engagement (2008).

**Leadership development in the church.**

Bekker has compiled a synopsis of modern Christian leadership research and categorized their focus as:
1. Studies based in Biblical characters
2. Historical sociological and contextual descriptions
3. Studies of historical Christian figures
4. Ethical explorations
5. Cross faith comparative analysis
6. Formational process descriptions
7. Comparisons with leadership and management theories
8. Exegetical studies

This nine point synopsis of approaches can be quite varied in actual practice. Here, just a few will be elucidated.

The first and third categories are similar in style, but differentiate their focus. Biblical figures could include the likes of Joseph, Ruth, Isaiah or Paul as Biblical figures from whom one can learn the practice of faith. Third is the study of historical figures. This approach includes non-canonical figures such as Saint Francis of Assisi, John of the Cross, Calvin, Wesley, and Jacob Arminius (Malakyan, 1998).

Similar to “formational process descriptions”, number six, some leadership models are overtly practical explanations and impressions. These may be position based models (deacons, pastor, Sunday School teacher), skills based (orator, caregiver, counselor), or organizational (Robert’s Rules of Order, hierarchical flow charts). When there is a need, these forms provide the guidance for both new and existing leaders to know what to do, and
potentially give reference to how they interact with the organization. Leaders are formed in such a way that they can then serve the church.

In line with number seven above, some authors have taken existing leadership models or theories, and sought to assess the uniquely Christian facets that are either highlighted or lacking. One example of this type of work is *The Making of a Christian Leader* by T.W. Engstrom (1976). Engstrom, using a trait theory approach, delineates three aspects: 1) Christian traits that are held in common with secular settings. Creativity is one example that speaks to the individual’s ability to respond in novel ways to a situation. 2) Christian traits that are similarly enacted, but differently motivated. Engstrom includes *desire for achievement* here, but clarifies that while Christian ambition is still present, but it is tempered under the Lordship of Christ. 3) Unique traits that are not found within secular trait theory. An example here is the inclusion of faith and prayer as proclivities within the Christian leader that foster spiritual discernment and wisdom. A second example within Bekker’s seventh category is Stephen Wilt’s overlay of the modern theorists Kouzes and Posner within a robust exposition of the Biblical character of Moses (Wilt, 1995). Wilt’s use of theory expands a traditional understanding of a historical leader, connecting with modern rubrics.

In Bekker’s eighth focus, exegetical studies, divine underpinnings for both ability and direction of leadership are viewed as primary. There are expositions of Trinitarian traits; more commonly of the creator God, the Son Jesus the Christ, and less commonly the Holy Spirit. As Thoman delimits dozens of characteristics attributed to the creator God such as compassion, faithfulness, loving, and opposition of the proud, he sets the stage for the Christian leader to be, and do, likewise (2001). Similarly Malakyan speaks to the
Christological roots of leadership, saying that the intervention of the Holy Spirit imbeds the human leader with Christ-like attributes in a process of infusion that make the Christian leader stand apart (1998).

**Invitational Leadership situated among other theories.**

ILT proponents present it as a systemic, holistic understanding of leadership and organizational culture (Novak, 2005; Purkey & Siegel, 2003; Stanley & Purkey, 2005). With the discipline of education in common across church and school settings, it is worth considering ILT in relation to other leadership theories. It is not unreasonable to separate individual components of ILT for comparison with other research models. For example, take the Dimensions category from ILT and view it beside Goleman’s Emotional Intelligence construct. Figure 2, below, juxtaposes the ideas from Invitational Theory’s Dimensions category with those from Emotional Intelligence. The terminology differs but the constructs are similar: self awareness, self management, social awareness and relationship management have parallels in self personally, others personally, self professionally and others professionally (Goleman, Boyatzis, & McKee, 2002; Purkey & Siegel, 2003).
There is also an unmistakable symbiosis between invitational leadership and servant leadership. Note the following quote from Robert Greenleaf’s seminal book on servant leadership: “A new moral principle is emerging which holds that the only authority deserving one’s allegiance is that which is freely and knowingly granted by the led to the leader in response to, and in proportion to, the clearly evident servant stature of the leader” (Greenleaf, 1991). Purkey and Siegel acknowledge Greenleaf’s influence on their work at the closing of their book on invitational leadership (2003). Invitational Theory can be viewed as a systemic way to set the stage for followers to offer their allegiance.

Comparing ILT with other prevalent leadership theories included with this literature review, two absences are noteworthy: importance of emotion, and goal setting mechanisms. To the question of emotion and affect in ILT, we must first make an assessment that it was intended for it to be present (Purkey & Stanley, 1991; Purkey and Siegel 2003). As
Invitational Teaching, Learning, and Living opens, there is direct reference to the importance of emotions and affect:

In light of the present outpouring of new "reform" programs, policies, mandates, commission reports, edicts and legislation that focus almost entirely on school outcomes (as measured by multiple-choice tests), it seems pathetic...that so little attention is being given to a much more human concern: the emotional, affective, mentally and morally healthy side of the teaching/learning process. (Purkey & Stanley, 1991, p. 2)

Yet, the word “emotion” is only found four times in the ninety-one page work, and the term “affect” is only found three times, and these occurrence are in reference to friendship and affinity rather than an emotional state or reality (Purkey & Stanley 1991). Similarly, in Becoming an Invitational Leader, co-authored with Betty Siegel, there is limited attention paid to the concepts and potential impact of emotion and affect on leadership, learning, change, followership, and individual and organizational functioning. In this same book, there is a one page section entitled “Inviting Ourselves Emotionally”, which raises high expectations for the import of emotion. The brevity of this does not correlate with its stated importance (Purkey & Siegel, 2003, p.137).

The second absence from ILT, goal setting mechanisms, is the expectation of setting forth some of the tangible pieces of an organization’s mission. This can be highlighted by contrasting it with other theories such as transformational leadership, which demands clarity of mission at the highest level (Northouse, 2007). In discussing Team Leadership, Larson & LaFasto’s “Characteristics of Team Excellence” start with the following necessities that do
not seem evident with Invitational Theory: clear elevating goal, results driven structure, competent team members (Northouse, 2007). It can be argued that some of these elements are found deep within Invitational Theory, as “common goals” is mentioned under People in the Five P’s, but several other theories bring this to the forefront more forcefully.

**Opportunity to expand Invitational Leadership research to church settings.**

In 2001, Stanley and Purkey compiled a summary of ILT research articles, dissertations, and Master’s theses. Three settings were identified in this summary: (a) school settings; (b) counseling settings; and (c) community settings. Within the school settings, a vast majority were K-12 schools, with a minority of medical training settings such as nursing schools. The Journal of Invitational Theory and Practice (JITP) continued to publish research regarding Invitational Theory after the 2001 summary, with two additional categories of E-learning and generalized theory studies found beyond the school, counseling and community categories. Combining the Stanley & Purkey summary and the JITP articles through 2010, there were sixty five school based studies, seven in counseling, three in the broader community, one E-learning setting, and five theory based studies (see Appendix A). The opportunity for extending ILT was evident, as no churches were represented in eighty-one research endeavors.

**Literature Review Conclusion**

This literature review has provided a broad review of Invitational Leadership Theory, complemented by a synopsis of other leadership theories, and discussion of educational theory to support understanding the church as a learning system. Viewing church discipleship as a process of learning allows the field of adult education to inform its leadership and
practice. With intent to maximize the abilities and capacities of everyone involved, there is a depth of character building that supersedes simple behavioral reproduction. Frameworks that value the individual and collective benefits of spiritual maturity are led and developed by people at all stages of experience and desire. The plethora of both leadership and learning theories remind us of the complexity and uniqueness of each situation where teaching and learning can occur.

Invitational Leadership Theory has been offered by its proponents as a descriptive tool for understanding organizational realities, and a prescriptive guide to those same organizations interested in more fully realizing their potential (Amos & Purkey, 1988). Educational leaders who have adopted ILT attest that it can help reduce both perceived and behavioral discrepancies between espoused theory and theory-in-use (Egley, 2003). This chapter provides a skeleton for looking at leadership practice within Baptist churches, and opens the possibility of new discovery. Next, Chapter Three presents the design and methods that were implemented to bring this same benefit to the church. Chapters Four and Five present the findings generated, and Chapter Six offers discussion and conclusions.
CHAPTER THREE: RESEARCH DESIGN AND METHODS

A qualitative, postpositive, case study was implemented to answer the research question, “What does leadership look like in three Cooperative Baptist Fellowship affiliated churches through the lens of Invitational Leadership Theory?” This chapter describes and justifies the methodology, data collection, and data analysis. The limitations, veracity, trustworthiness, and researcher subjectivity are also addressed. Affiliated documents, such as the interview protocol and Internal Review Board materials, are discussed and referenced in the appendices.

The purpose of this research was to broaden the understanding of leadership in Baptist churches, and to expand the research of Invitational Practice. ILT has been applied to public education, hospital, and counseling settings (Purkey & Stanley, 2001). However, no research studies addressed whether the theory is applicable or useful in the life of Baptist churches. Existing ILT research formed an initial frame to structure the study, while qualitative methods allowed for discovery within the novel research setting of Baptist churches.

Qualitative Approach

There is ongoing debate within the academic community about the role and place of qualitative and quantitative approaches to research (O’Driscoll, 1998). This debate may be attributed to a difference in research goals. Seeking causality is common to quantitative approaches. Causality is often part of a reductionist, deterministic philosophy, where complex elements can be narrowed down to fewer and fewer factors (Bloomberg & Volpe, 2008). Seeking meaning and “interconnected thoughts or parts linked to a whole” are typical
of qualitative approaches (Creswell, 1994, p.94). Qualitative research makes use of an inductive philosophy for knowledge generation, where elements are “emerging in the design” (Creswell, 1994, p.95).

Gall, Borg, and Gall assert that positivist, or quantitative research “is grounded in the assumption that features of the social environment constitute an independent reality and are relatively constant across time and settings. Positivist researchers develop knowledge by collecting numerical data on observable behaviors of samples and then subjecting these data to numerical analysis” (Gall, et.al., 1996, p.28). Postpositive, or qualitative research, on the other hand, “is grounded in the assumption that features of the social environment are constructed as interpretations by individuals and that these interpretations tend to be transitory and situational. Post-positivist researchers develop knowledge by collecting primary verbal data through intensive study of cases and then subjecting these data to analytic induction” (Gall, et.al., 1996, p.28).

As discovery of dynamic systems and personal meaning are pivotal to this study, a qualitative approach was utilized. This postpositive approach to collection and inductive analysis stems from the understanding that “qualitative research is best used to discover themes and relationships at the case level, while quantitative research is best used to validate those themes and relationships in samples and populations. In this view, qualitative research plays a discovery role, while quantitative research plays a confirmatory role” (Gall, et.al., p. 29). Qualitative research allows for a more robust documentation of the leadership experience, allowing for a comparison with existing ILT categories and structure. Discovery
within, and beyond, the existing framework of Invitational Leadership Theory was possible via the participant responses and other data sources.

**Case Study Justification**

Given this intention, an exploratory multi-site case study methodology was utilized. This allowed for open ended evaluation and documentation with no single set of outcomes expected (Yin, 2003). For this research, churches affiliated with the Cooperative Baptist Fellowship formed the case itself, with three churches functioning as representative embedded units. Reliability and richness of data are advantages of the multi-site approach, as “the ability to look at sub-units that are situated within a larger case is powerful when you consider that data can be analyzed *within* the subunits separately (within case analysis), *between* the different subunits (between case analysis), or *across* all of the subunits (cross-case analysis). The ability to engage in such rich analysis only serves to better illuminate the case” (Baxter & Jack, 2008).

In his discussion of case study, Robert Stake contextualizes the case study as one in which “we have a research question, a puzzlement, a need for general understanding, and feel that we may get insight into the question by studying a particular case” (Stake, 1995, p.3). The churches chosen could be drawn from a wider selection, showing this is not an *intrinsic* case study (Stake, 1995). In this study, the case was used to understand how leadership is experienced in Baptist churches, and subsequently assess the tenets of Invitational Leadership Theory through these reports. Exploration across the three sites involved interviewing a total of nine individuals and conducting participant observations. Lengthy, open ended interviews and multiple participant observations provided a broad understanding
of how leadership is enacted and understood. Through data analysis the strengths, weaknesses, inclusions and omissions of the Invitational Leadership Theory were documented. This research method shaped the researcher’s interaction with the study sites and the nine participants (Stake, 1995).

Creswell describes a particular article utilizing this approach in his discussion of case study. Citing a study that took an existing theoretical model and assessed it in a unique situation, much as this research took ILT into a novel situation, Creswell writes: “a close inspection of how they used this model reveals that they believed it was ‘incompletely conceptualized and, as a consequence, only imprecisely understood and measured’” (Creswell, 1994, p. 433). The present study of Baptist church leadership was undertaken with the premise that there were similarly incomplete conceptualizations of Invitational Leadership Theory. One might consider this process like translating languages; an expectation of ‘translating’ ILT from school to church settings was expected. Upon translation of ILT to the context of Baptist churches, then the study was able to look for voids, imprecisely understood and measured. These voids fell within expectations in that they were missing, mis-labeled, or undocumented constructs. Thus the ILT model was not being tested in this study as one would find in a quantitative project, but rather is “modified in the study” (Creswell, 1994, p.96). The multi-site case study offered a base of experience for this discovery and adaptation to occur.

**Recruitment Process**

In forming this case, outside church affiliation was used as a primary boundary; the churches that participated are affiliated with the Cooperative Baptist Fellowship (CBF).
Affiliation is determined by a church participating in any combination of the following: (a) financial support of missional activities, (b) shared fellowship and worship, (c) collective learning and development opportunities, and (d) use of church support services. This affiliation signals that the church shares identity and understanding of core values, such as soul freedom, church freedom, Bible freedom, and religious freedom as these principles are in the founding documents of the CBF (CBF, 2009). Therefore, site selection for this study was purposive rather than random. Table 7 provides an overview of this selection process.

Table 7

<table>
<thead>
<tr>
<th>Site selection process</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Cooperative Baptist Church affiliates identified in a southeastern region (@350).</td>
</tr>
<tr>
<td>2. Contact three regional and local Baptist denominational leaders to get recommendations for pastoral and church participants. Churches in crisis, or without a pastor, were removed based on these recommendations.</td>
</tr>
<tr>
<td>3. Letters were sent to the pastors of 68 churches.</td>
</tr>
<tr>
<td>4. All eight positive responses were contacted to further determine best fit. Three churches were selected recognizing pastoral and lay leader availability and general similarity of size and organizational structure (multi-staff, 200-1000 weekly attendance).</td>
</tr>
<tr>
<td>5. IRB information disseminated to participants and a meeting time and place was established.</td>
</tr>
</tbody>
</table>

The first step for this case study was to identify potential churches. Using the public member roster from the CBF website, churches in the southeastern portion of the United States were requested. This list was reduced to approximately three hundred and fifty church names across a broad, but accessible, geographical range. Input for further reduction and selection was requested from a personal network of ministerial contacts. This personal network list was generated by a blend of asking colleagues for contacts or information about effective church leaders, often called snowball sampling, and my pre-existing personal
network of professional colleagues across state, regional, and national organizations. A list of sixty eight churches was identified for initial contact by letter that met the three sampling criteria: 1) geographically accessible; 2) an active member of the CBF; and 3) included in my modified snowball sampling/personal professional contact list.

Second, introductory letters were sent to the pastors of potential research site churches. A sample introductory letter is found in Appendix A. The initial research proposal allowed for additional contact by phone, but the response to the letters was sufficient. Eight pastors indicated personal and organizational willingness to participate. Once a church, represented by their pastor, agreed to participate, related documents concerning ethical considerations and the informed consent process were provided (Appendix B). This allowed the pastor to review the study from the perspective of those who would be involved: personal, church, and additional participants who had not yet been identified or contacted. This dialogue occurred across printed, email, and telephone elements until both parties were confident all questions she/he may have about the study were addressed. Pastors did exercise due diligence here; they clarified the involvement of their churches, were curious if the questions and format of interviews would be similar for their parishioners as it had been for them, etc. In this early stage of contact, I queried the pastor whether it would be best to include a governing body, such as the deacons or governing council, in the decision to participate in the study to verify broad acceptance of support. One pastor thought that to be a prudent step, took it to a leadership body, and the group affirmed the opportunity to participate. Three churches were further selected from the eight positive responses. Final inclusion gave consideration to the availability of key lay leaders in addition to the pastor,
and general similarity of size (200-1000 weekly attendance) and organizational structure (multiple vocational ministers, broad committee involvement).

The pastors served as one of three interviewees from each church. Gathering diverse perspectives was important to this study, grounded in the foundational democratic ethos of ILT. One tenet of the democratic approach is that no one viewpoint functions as the singular voice for an organization. By including both vocational and volunteer leaders, the spirit of democracy is, at the least, acknowledged. Lay leaders are generally elected to particular offices and responsibilities by the vote of the church, but serve from a volunteer capacity rather than as paid, vocational positions. This practice was found in all three sites of this case, and the respective pastors worked with me to identify the chairperson of an education committee or program, and a chairperson of the diaconate or church council. These two lay vantage points include educational, relational, and administrative issues.

Lay participant selection was guided by these tenants: (a) the minister had to be comfortable with the participants selected; (b) all participants were made aware that their identities and churches were to be changed within the final public documents to provide confidentiality; (c) the participants received informed consent forms and were made aware that they could withdraw at any time with no penalty; and (d) the resulting group of interviews represented multiple viewpoints in the church, and the case.

**Data Collection**

Stake describes observation, interview and document review as primary sources of data gathering for case study designs (Stake, 1995). This study made primary use of two of these types of information - interviews and participant observation. Document review was
included in a limited fashion, as the participant observation activities garnered a range of documents; bulletins, newsletters, calendars of activities, flyers promoting service opportunities, and even some sections of the bylaws were provided by one participant. These documents were not subjected to the rigorous coding process described herein, but were given strong consideration to establish consistency and validity in the analysis of the researcher.

**Interviews.**

Nine semi-structured interviews were originally intended to be conducted with the participants. As a result of an identified participant later becoming unavailable, an adjustment was made from the original research proposal that resulted in one interview actually having two participants. This change was made in consultation with the dissertation co-chairs and with IRB approval for the difference in protocol. This change maintained the original intention of having nine individuals included; three vocational ministers and six lay leaders were interviewed from a total of three churches.

Locations and times were chosen by each participant. Two participants preferred their residence, and seven people interviewed in their respective church facilities. Demographic and contextual data was gathered prior to each interview, including: (a) gender, (b) age, (c) length of affiliation, (d) current positions, (e) leadership roles in other churches, (f) and self perceptions regarding levels of involvement. The full questionnaire can be found in Appendix C. Each interview lasted from ninety to one hundred and thirty minutes, following the interview protocol as provided in Appendix D. Researcher log entries followed interviews with additional note taking, idea sorting, and narratives.
Audio recordings have been destroyed upon confirmation of accurate transcription. Individual and church names were replaced with pseudonyms in the transcripts and written documents to increase confidentiality. Additional materials collected during the participant observation have been destroyed at the conclusion of data analysis and co-chair review. The pseudonym cross reference list connecting the transcript to the interviewee was kept in a separate, secure location.

**Participant observations.**

Participant observations were included in the methodology of this study to provide triangulation of data, with the interviews providing the majority of the research material. Invitational Leadership Theory takes into account the places where invitation happens or does not happen so it was especially relevant for this study to engage the actual settings. Corporate worship is of primary importance in the life of a church, as collective attention is granted to the deity, and to the other members of the fellowship or congregation. Therefore, three site visits were made to Sunday morning public worship; one for each participating church. The ILT concept map (Figure 1) provided a general guide for site visit observations, with a corresponding list of markers, provided in Table 8, offering more specific cues for observation.

**Table 8**  
*Data collection markers*

<table>
<thead>
<tr>
<th>Basic Concepts of ILT</th>
<th>Concept Components</th>
<th>Markers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assumptions</td>
<td>Trust</td>
<td>Delegated power.</td>
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<tr>
<td></td>
<td></td>
<td>Interdependence.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Relationships valued.</td>
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<tr>
<td></td>
<td></td>
<td>Believability.</td>
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<td></td>
<td></td>
<td>Shared use of expensive tools.</td>
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</tbody>
</table>
Table 8
*Data collection markers* (continued)

<table>
<thead>
<tr>
<th>Basic Concepts of ILT</th>
<th>Concept Components</th>
<th>Markers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Respect</td>
<td>People are able, valuable, and responsible and should be treated accordingly. Security. Shared benefits. A chance to learn by mistakes. Ongoing investment/development.</td>
<td></td>
</tr>
<tr>
<td>Optimism</td>
<td>People possess untapped potential in all areas of human endeavor. Hope for beneficial change. Everything counts.</td>
<td></td>
</tr>
<tr>
<td>Intentionality</td>
<td>Involves conscious decision making. Gives meaning. Purpose and direction.</td>
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</tbody>
</table>
Table 8
*Data collection markers* (continued)

<table>
<thead>
<tr>
<th>Basic Concepts of ILT</th>
<th>Concept Components</th>
<th>Markers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inviting Others</td>
<td>High aspirations for others.</td>
<td></td>
</tr>
<tr>
<td>Professionally</td>
<td>Fight sexism and racism.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Work cooperatively.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Give professional feedback.</td>
<td></td>
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<tr>
<td></td>
<td>Maintain optimism.</td>
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</tr>
<tr>
<td>Areas of focus</td>
<td>People</td>
<td>Every person matters.</td>
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<tr>
<td></td>
<td>Social connection.</td>
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<td></td>
<td>Special events.</td>
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<td></td>
<td>Encouragement.</td>
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<td></td>
<td>Morale builder events.</td>
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<tr>
<td>Places</td>
<td>Aesthetics.</td>
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<td></td>
<td>Temperature.</td>
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<td></td>
<td>Maintenance.</td>
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<td></td>
<td>Positively worded signs.</td>
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<tr>
<td></td>
<td>Art.</td>
<td></td>
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<tr>
<td></td>
<td>Living plants.</td>
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</tr>
<tr>
<td></td>
<td>Furniture.</td>
<td></td>
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<tr>
<td>Policies</td>
<td>Management.</td>
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</tr>
<tr>
<td></td>
<td>Few, clear rules.</td>
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</tr>
<tr>
<td></td>
<td>Stated in the positive rather than negative (“Respect others”, not “No Hitting”).</td>
<td></td>
</tr>
<tr>
<td>Programs</td>
<td>Foster cooperative learning.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Diverse populations.</td>
<td></td>
</tr>
<tr>
<td>Process</td>
<td>Context as important as content.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Not what is done, but how.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Social reality in addition to task.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Students both learn and teach.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consensus rather than fiat.</td>
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</tr>
<tr>
<td></td>
<td>Mutual evaluations.</td>
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</tr>
<tr>
<td>Levels</td>
<td>Intentionally inviting</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Awareness of those struggling.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Encourage participation.</td>
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</tr>
<tr>
<td></td>
<td>Responsive to others.</td>
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<tr>
<td></td>
<td>Realistic expectations.</td>
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<tr>
<td></td>
<td>Celebrate other’s success.</td>
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</tr>
</tbody>
</table>
Table 8  
*Data collection markers*  (continued)

<table>
<thead>
<tr>
<th>Basic Concepts of ILT</th>
<th>Concept Components</th>
<th>Markers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unintentionally inviting</td>
<td>Likable.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Entertaining.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enthusiastic.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Lack of intentionality.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Can describe <em>what</em> they do, but not <em>why</em>.</td>
<td></td>
</tr>
<tr>
<td>Unintentionally disinviting</td>
<td>One sided rules.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Lack of manners.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>False praise (This is good, but…).</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Chauvinism.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Condescending attitude.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Thoughtless.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Patronizing.</td>
<td></td>
</tr>
<tr>
<td>Intentionally disinviting</td>
<td>Demean.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Dissuade.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Discourage.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Defeat.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Destroy</td>
<td></td>
</tr>
<tr>
<td>Products</td>
<td>Beneficial presence</td>
<td>A summative expression of individual choices among the branches Areas and Levels. Was the outcome helpful and constructive? (Purkey, 1991)</td>
</tr>
<tr>
<td>Lethal Presence</td>
<td>A summative expression of individual choices among the branches Areas and Levels. Was the outcome reductive and destructive? (Purkey, 1991)</td>
<td></td>
</tr>
<tr>
<td>Six “C”’s” of Conflict</td>
<td>Concern</td>
<td>Is this an issue?</td>
</tr>
<tr>
<td></td>
<td>Can it be overlooked?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Involve ethics, legality, morality or safety?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Am I biased?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(Purkey &amp; Novak, 1996)</td>
<td></td>
</tr>
</tbody>
</table>
Table 8
Data collection markers  (continued)

<table>
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<tr>
<th>Basic Concepts of ILT</th>
<th>Concept Components</th>
<th>Markers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confer</td>
<td>Communication.</td>
<td>Understanding among those involved.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Room for compromise?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Agreement.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Purkey &amp; Novak, 1996)</td>
</tr>
<tr>
<td>Consult</td>
<td>Clarification.</td>
<td>Re-conceptualize problem.</td>
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<td></td>
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<td>Is this worth escalating?</td>
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<td></td>
<td></td>
<td>Review consequences of intervention.</td>
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<tr>
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<td>Is time available for reflection?</td>
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<td></td>
<td></td>
<td>(Purkey &amp; Novak, 1996)</td>
</tr>
<tr>
<td>Confront</td>
<td>Attempt at resolution.</td>
<td>Documentation of issue.</td>
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<td></td>
<td></td>
<td>Assessment of authority and power.</td>
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<tr>
<td></td>
<td></td>
<td>Explore all options prior to acting.</td>
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<td>(Purkey &amp; Novak, 1996)</td>
</tr>
<tr>
<td>Combat</td>
<td>Issue based, not personal.</td>
<td>Verify documentation.</td>
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<td></td>
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<td>Last attempt for compromise or new agreement.</td>
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<td></td>
<td></td>
<td>Implement consequences.</td>
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<td>(Purkey &amp; Novak, 1996)</td>
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<tr>
<td>Conciliate</td>
<td>Forgiveness.</td>
<td>Willingness to work together again.</td>
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<td>(Purkey &amp; Novak, 1996)</td>
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<td>(adapted from Purkey &amp; Stanley, 1991, except as noted)</td>
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Functionally, the markers above were considered as questions for engagement during the site visits. For example, the Area of Policies was considered as: “How would you find out the ‘rules’ of this place?” Exemplary questions for the Area of Programs were: (a) Could you find out what was offered? (b) Were overt invitations to participation proffered?, (c) Are
instructions clear for participation if you wanted to participate? (on site, off site, maze of
building, etc.), and so on.

Participation with the churches during Sunday morning activities provided access to
facilities, printed materials, collective language as well as observable relational patterns. In
recognition of this, one level of observation concerned the physical environs. The presence or
absence of signage, maintenance, functionality, and general aesthetics were thoughtfully
observed. Beyond the physical surroundings, a sense for the general culture of the church
was sought. Notes were made mentally, on the backs of bulletins, on a smartphone, in a
professional notepad, and on a laptop. All manner of observations were included in the
observation notes, from obviously inviting and disinviting events to less tangible aspects like
verbal language, body language, rituals, energy levels, etc. Researcher notes were made
during the service as possible, and following the worship experience to record additional
insights and connections. Exceptional, disappointing, or distinctive occurrences beyond the
identified constructs of ILT were also included, along with personal reactions and thoughts.
As worship is generally open to the public, the reason for my presence was simply relayed as
being a visitor that day, or seeking to learn about churches in the area.

Data Analysis

Data analysis began with review of field notes, and chronologically adjacent post-
interview field notes. As this study sought to broaden understanding of leadership in Baptist
churches, the initial data analysis allowed for emergent themes to arise from the data.
Transcription began the formal sorting of interview data. As Riessman contends,
transcription is integral to analysis and “cannot be easily distinguished from” it (1993, p. 60).
Assistance with transcription was explored and requested, but the quality proved so low with the selected venue that all transcription was effectively done by the principal researcher. Saturation with the transcripts resulted in a deep familiarity with the materials, a profound asset in the later stages of open coding, versus coding, ILT coding, looking for themes and patterns, analysis, and drawing conclusions.

In addition to hand coding, computer software was utilized for this and subsequent levels of handling data. Transcripts and observational notes were first coded for in vivo meaning, with a strong inclusion of “open” coding occurring. Saldaña distinguishes between ‘In Vivo’ coding and ‘Open Coding’, with In Vivo referring to direct quotations, and Open Coding referring to a deductive product of ideas and themes (2009). Functionally, overlap of in vivo and open coding occurred; specific quotes and wording were extracted, as were key ideas. Both were helpful to identify patterns, language and important systemic meaning in the context of Baptist church settings.

Third, “versus coding” was implemented, as many of the themes being generated were contrasting concepts that conveyed more meaning when acknowledged together. In the initial proposal for this research, open, in vivo and axial coding were indicated for analysis. As open and in vivo coding progressed to an advanced stage, it was apparent that additional moetic components were present that would not be fully captured using existing ILT literature categories. As “the process of analysis is both deductive and inductive”, versus coding was added to accommodate an unforeseen need during the proposal phase of the study (Bloomberg & Volpe, 2008, p.75). Saldaña posits that “versus codes identify in binary terms the individuals, groups, social systems, organizations, phenomena, processes, concepts, etc.
in direct conflict with each other” (2009, p. 94). Citing Wolcott, Saldaña goes on to describe the concept of *moieties* as “one of two – and only two – mutually exclusive divisions within a group” (2009, p. 94). This particular definition pushes towards a positivist understanding of reality, which Saldaña later clarifies is not an exclusive understanding, encouraging multiple categories rather than the “only two” Wolcott ascribes. Chapter Five will demonstrate the participant’s use of contrasting descriptions were not all mutually exclusive, and for that matter, not always binary. The versus codes can be generated from sentence couplings, identification of opposing stakeholders, juxtaposition of inconsistencies, and recognition of dilemmas (Saldaña, 2009). The inclusion of this type of coding was first initiated in an attempt to capture the participant’s use of the word “versus”, and the method proved to capture a much wider reality than just those instances.

Axial coding was engaged as a fourth approach to the data, based on empirical indicators for each of the basic concepts of ILT. Empirical indicators are concrete examples of the abstract concepts contained within a theory. Table 8 above provided the empirical indicators, called ‘markers,’ that were used to identify the presence/absence of a given ILT concept. For reference, these empirical indicators are based in the six principal categories of ILT seen in Figure 1. The coding for Invitational Leadership was grouped in the same six categories: Foundations, Assumptions, Dimensions, Areas, Outcomes, and Conflict management.

In summary, the researcher personally collected the data, reviewed the data (interviews and observational notes) at multiple stages, transcribed, and personally verified
transcription accuracy via repeated listening and comparison to the printed transcript. In vivo and open coding were next, with versus and axial coding subsequent.

**Trustworthiness**

There are four areas built into this study to improve the trustworthiness of the findings. The areas are: (a) self reflexivity and disclosure; (b) comprehensive collection and analysis plans; (c) participant review of interviews; and (d) triangulation.

**Self reflexivity and disclosure.**

A researcher log was maintained over course of the project. Entries focused on highlights of ILT, difficulties and successes in the practical matters of working with people, and troubling spots observed in the actual practice of churches. The researcher log offered opportunity to see certain mental conundrums in black and white text. Some were expressed and abandoned; a few ideas came back as relevant and helpful.

During data collection, the early interviews were assessed to determine if relevant data was in fact being produced. Little need for adaptation was indicated, as thick, rich description of leadership processes within Baptist churches was evident. Member checking allowed for corrective action on the part of the participants if they had any desire to clarify or alter their recorded experience.

Multiple exposures to the data through transcribing, re-reading, re-listening, reflection, open coding, versus coding, axial coding, and multi-pass theme compilation during the findings and conclusions section of writing has been undertaken to aid significant discovery within these Baptist leadership experiences.
Participant review of interviews.

Allowing participants to review the transcript of their own interviews allows for verification of intent and reflexivity on the participant’s side. They were able to decide that an idea did not come out as they intended, or they have thought of a better example of the same thought since their original interview. Following transcription, participants were provided a brief summary of their interview. Opportunity for correction or clarification was offered to each participant.

Triangulation.

Triangulation was accomplished by having multiple sources of data as alternate lenses to see the same organization. Participant observations and related documents, in addition to interviews with the pastor and lay leaders allowed for objective and subjective comparisons to their perspective. Each facet added to the trustworthiness of the study.

Researcher Bias and Subjectivity Statement

One area for possible researcher bias is my desire for the church to succeed in theological, philosophical and practical ways. I am theologically inclined to understand the world as one where people and organizations are to respect and value individual participants, often to the exclusion of tangible results or productivity of that individual. As such, I hold pre-existing definitions for “success”, such as a presumption that democratic process and decision is somehow “better”. Acknowledging this existing preference reduced the possibility of blind spots in hearing other views. Care was taken to avoid introducing this bias into the construction and direction of the inquiry and data collection.
There are ties between every researcher’s personal biography and their work. One question that was important to anticipate before going into the field was ‘How will I be viewed?’ (Maxwell, 2005). One incident occurred that minimally left the researcher in an awkward position. A staff member at one church that was previously known through personal connections, chanced across a layperson and the researcher in preparation for the interview. In conversation, the staff member verbally put two and two together and realized the purpose of my visit. I clarified the expectations of confidentiality for the sake of all the participants, which the staff member readily acknowledged and agreed to abide by. No significant incidents occurred that left the researcher or participants expressing overt suspicion, discomfort, or negative understandings.

**Methodological Limitations of the Study**

Research brings with it the risk of introducing what is called the observer effect. This term describes the possibility that researcher involvement with the case actually changes the case (Wilson, 1977). The fact that a researcher is there looking, asking and watching may alter the reality of that setting. Relevant to this study, leader’s experiences may have been altered by the process of reflection and observation inherent to this methodology. The limitation of the observer effect, is both relevant and difficult to assess. Monahan and Fisher argue that observer effect can not only avoid negative influence, it can actually prove beneficial (2010). It is the conclusion of this researcher that the observer effect did not negatively alter the presentation of this case.

Self censorship by participants is a potential limitation in a study of this type (Horton, 2011). Conversations with leaders often describe an “underbelly” of reality that may not
match the espoused theory of the individual or group. The potential stigma of failing to meet espoused values may reduce the inclusion of negative experiences, or reduce the reported level of their full impact. A theoretical example of this might entail an interview with a pastor who chooses to relate a story where there was a broad base of involvement on a decision that matches the established Baptist history of democratic polity. What is to be made of the case if it is really more typical for that pastor to simply decide by fiat what direction or result is next? Similarly, lay interviewees may relate a broad base of participant involvement when, in fact, decisions are being made by a select few. Given the limited, yet real, possibility of personal or relational repercussions, prurient steps following university protocol were taken to maximize confidentiality and enact a “do no harm” ethic.

As the actual case interaction for this study spanned less than a year, another limitation is the relatively short term engagement of lifelong patterns. A long term case study has the benefit of additional encounters and situations (Stake, 1995). Churches, like most organizations, sometimes use one style of action in certain circumstances or encounters, but not others. To exemplify, a church may be very democratic on all things service oriented, but when it comes to a building decision, one person with an ability to give large sums of money may inordinately sway a decision that is theoretically a shared decision. A longer period of involvement may have shown different practices.

Not including all available documents was a limitation for this study. There are usually minutes of business meetings, weekly bulletins, newsletters, pamphlets, constitutions, bylaws, church polity, nominating committee guidelines, historical data, mission reports, annual budgets, and many other documents that show how engagement actually transpires.
These additional points of reference would have expanded the scope of this research, but were deemed impracticable and have been left out (Stake, 1995).

The scope of this study did not allow for a complete representation of people and groups within the churches. Without this full picture, the assessment of the followers viewpoint of leadership is extremely limited. Extending Bandura’s discomfort for extreme dualisms, we should not separate too far the leaders and the followers (2000). Reciprocality is one of the key factors of influence in the social cognitive understanding of interaction, and it logically follows for leader/follower interactions as well (Bandura, 2001). Following this thought, we cannot fully assess the experiences of the identified leaders without involving the people with whom they work.

**Chapter Summary**

Chapter Three has established the methodology by which the documentation of leadership experiences across three Cooperative Baptist Fellowship churches, and a subsequent analysis of ILT components within those experiences, was conducted. This multi-site case study did not take positivist outcomes or causal relationships as the research intention. Instead, qualitative methodology was implemented to gather meaning and understand crucial relationships; primarily through interviews and participant observation, with a limited involvement of additional documents. The observer effect and self censorship by participants were identified as potential limits for the study, as well as three additional constraints which limited the breadth of the study: longevity, scope of data, and scope of participants. This study has allowed for thick, rich description of the church environment, heard especially strong in the voices of identified leaders.
The next two chapters present the findings generated from the methodology delineated here in Chapter Three. The first research objective, a structured documentation of church leadership experience, will be addressed in Chapter Four through constructed narratives and a summary of the three sites that make up the case. The structured documentation will continue in Chapter 5, as findings specific to ILT are presented. The analysis offers broad structure to allow the participant voices to speak clearly, and also to look specifically for previously identified components of ILT. The rigorous exploration within the identified case contributes to the literature surrounding Invitational Education, and Invitational Leadership Theory, as no existing ILT research utilizes the church as the research site.
CHAPTER FOUR: CASE OVERVIEW AND CONSTRUCTED NARRATIVES

This dissertation centered on the following research question: What does leadership look like in three Cooperative Baptist Fellowship affiliated churches through the lens of Invitational Leadership Theory? The case included three churches that affiliate with the Cooperative Baptist Fellowship, as core understandings of culture and behavior are shared between the defining statements of this group and Invitational Leadership Theory (CBF, 2009; Purkey & Siegel, 2003). Sixty eight potential churches were identified, and letters with information and a request for participation were physically mailed to the pastors of record. From thirteen total responses, eight pastors indicated personal and organizational interest for the study. From the eight potential churches, three were chosen for inclusion. Similar attendance (300-600 weekly) and organizational structure (vocational staff of 6-12, with committee based lay involvement) allowed for a cohesive purposeful sample. All participants, churches and locations have been given pseudonyms for this report.

Vocational and lay (non-ordained) leader experiences were important to this study, and individual participant selection reflected this objective. One pastor and two lay leaders from each church were sought to participate, with lay leaders being identified for inclusion via an administrative leadership position or an educational leadership position within their church. The pastors served two functions in the study; coordinators as well as participants. As coordinators, the pastors were the principal contact to indicate the church’s ability to participate, and assisted in the purposeful recruitment of lay leaders. As participants, these pastors represented the role of vocational leaders in the case. This process yielded three leaders from each of the three churches, for a total of nine interview participants. Participant
observations of the church facility and public worship for each church were conducted by the researcher to allow greater validity and assist in a case summary that unifies the data.

This chapter provides an overview of the case; first through constructed narratives, followed by a descriptive summary which gathers contextual and demographic information. An extensive use of quotations has been implemented to allow for the participant voices to be directly heard, a hallmark of qualitative research (Patton, 2002). The following constructed narratives present brief snapshots of the source organizations and individuals involved with this study.

**Site 1: Mountain Crest Baptist Church**

Mountain Crest Baptist Church is located in a blended use, and fast growing, part of Breckerville. With expansive new residential neighborhoods, large established neighborhoods, and a significant commercial corridor just minutes away, this church is surrounded by activity. This facility only represents about a fourth of the lifespan of the church, having moved here in response to changing demographics in their first location. The current facility is modern in appearance, well maintained, with care given to the grounds, usability, access, and appearance.

The site visit indicated a facility that matched the congregation’s current worship experience very well. The sanctuary was open and well lit with both artificial and natural lighting; the acoustics for speech and song were outstanding. No seat felt ‘too far’ from the podium, yet several hundred could easily come together at one time. With a warm and friendly ‘buzz’ of activity, preparation, and personal greetings before the service, the atmosphere matched what one interview claimed as “feeling like a family reunion.”
One incident that struck me as literally the most welcoming, inviting, encounter I had during the entire research process occurred at this church before I had even been out of my car for one minute. I had come to the church mid-week to interview the pastor and parked near the entrance clearly marked for the offices. Upon exiting my car and reaching the base of the entrance steps, a bright, smiling, woman came out of door and welcomed me with enthusiasm. She had noticed my arrival and wanted to be sure the door had not remained locked from an unattended lunch period. This impressed me greatly, as she could have waited and responded to my knocking if it was locked, but she made sure I was not literally or figuratively ‘left out in the cold.’ She then ushered me into the pastor’s office, explained where he was, when he would arrive, asked if I needed anything, and resumed her other tasks.

**Dr. Bob Pollard, Pastor.**

Bob opened his interview with a geographic reference, pointing out that he has returned to his hometown to pastor Mountain Crest. Raised in a church setting and making a public profession through baptism at the age of nine, Bob grew up with a “foundation and belief system from early on” that undergirded his personal and professional life. Placing his “call in ministry” to the middle of his college experience, he followed his undergraduate work with a master’s degree in seminary, and later a doctorate in ministry (which was not specifically iterated in the interview). He first described several churches he had experienced over the years, in both lay and vocational capacities. His biological family was soon included, acknowledging close connections to the older and younger generations of parents and children, as well as the vocational teaching background of his wife.
Bob had leadership experience growing up in the areas of sports, adolescent focused business clubs, and church youth groups. The death of a close friend in high school, precipitated “a period of transition for me in my high school to college years…where I was not involved in church”. This led to a time of theological “struggle with…my understanding of the role that God played in the midst of all that.” As he came “to grips with my view of God,” he began to volunteer with church youth groups, which led to working with youth vocationally. He began to find additional “meaning” when he fulfilled pastoral duties after the departure of the senior pastor where he was the youth minister. Now in his third pastorate, he is in a church that started in a “close knit community” sixty years ago. The church made substantial adjustments about fifteen years ago, physically moving closer to its membership as demographics changed. In recent years, the church is again assessing expectations, as it is in a “changing community again.”

Speaking to some of the “structure” of the church as an organization, Bob described a “traditional…Baptist church” with a board of deacons “providing an overriding leadership role” as well as “ministry.” This dual role is currently in flux as “we’ve shifted to try and reclaim deacons as spiritual leaders; as discerning what we need to be about as a congregation”. Structurally, a wide committee structure fills out the leadership roles, organized under “congregational polity.” This congregational “Baptist polity is not supposed to be hierarchical; in a sense it is supposed to be the…congregation working together. But, the reality is, there are times when you have to make some decisions without waiting to the next meeting.”
Addressing key ideas and expectations for the church, he said “this church highly values relationships”, “authenticity”, “love”, “trust”, “tradition”, “genuine concern, care, and compassion for one another”. Asked to define leadership, Bob replied, “From my own experience and perspective, and my own theology, I think that a leader is somebody who’s a servant...certainly a leader is able to accomplish things. Hopefully they’re able to accomplish things with a team of people instead of by ramming things down people’s throat. I think leadership is collaborative in nature, to gather the support of a group of people and move forward...in authentic ways that are not contradictory to the example that we see in Christ.”

Bob expressed concern that church leadership has a tendency to focus “so much on the destination”, that sometimes the journey itself is “just kind of neglected.” Recounting one particularly tense situation, he recalled telling the participants: “we can embrace what has happened, or we can get into a fight about it.” This outlook undergirds the three pastoral roles he identified, “hats” he called them: 1. Preacher/teacher 2. Pastoral care/counseling, and 3. Administration/CEO.

A story of conflict led him to state “This congregation…if there’s conflict they tend to take it on…let’s talk about it, let’s figure, let’s resolve it, let’s deal with it. Don’t let it lie, even if it is somewhat confrontational. Let’s...not let it become something that it shouldn’t be… (With another) congregation (he served), it was conflict avoidance; let’s not deal with this…let’s hope it goes away, let’s not have a conversation that we don’t need to have. That kind of approach…Those to me are the two extremes.”

A story early in the interview about a mentor who “encouraged me” contrasted with a story early in his career with a supervisor “that didn’t ever want to serve with another staff
person.” The differences in these situations fostered an “evolution of how I viewed the pastor; from a more authoritative figure, to more of a fatherly figure, to more of a collaborative role.”

**Ben Wall, Deacon Chair.**

Ben began by sharing some of his personal history; native to Breckerville, adopted into his lifelong family at the age of nine, and several vocational directions. Though educated as a teacher, he chose other service oriented careers as a young adult, eventually returning to construction as a primary vocation “so I could actually make a living.” The complex expectations that come from familial, organizational, economic, and societal roles are poignantly highlighted in the stories he told. Showing a broad awareness of cultural and societal differences in the interview, Ben referenced several occurrences of socio-cultural adjustment within his own experience. Some of these adjustments were connected with geography; time as a young adult in the mountains contrasted with his previous worldview. Ben also noted changes in his hometown over his lifetime, which included urbanization and increased diversity.

The first two stories in the interview related incidents centering on children. In the first, he witnessed what was basically parental child abuse in a semi-public setting; in the second he witnessed extreme discipline towards children. A key difference between the two stories was that in the second one, which happened later in his life, he felt his intervention made a difference to the other person’s subsequent methods. These stories were indicative of the broader narrative presented through the interview; Ben was willing to be involved in the work of the church in a way that established clear and open communication. He frequently
intervened in situations that seemed unfair or seemed to serve the expectations of a leader or group to the exclusion of the larger community or less powerful individuals.

Expressed was a strong desire for community, exemplified in a comment about a favorite place: “Up there they all look out for each other”. Ben was both philosophical and practical in his desire to reach a fuller expression of community in his church. The community of family is of great significance as well; biological family, adopted family, and his current roles as husband and father were included frequently. He did express tension between the different communities, realizing that time and money often limit giving each the attention he would like.

In the church, Ben moved from an observer to a recognized leader as an adult. Having been a part of several churches, his connection with his current church has brought him to formal leadership across several committees, chairing most of them during the course of service. Confronting other formal leaders, as well as disconcerted congregational participants, was part of his understanding of leadership. Included were several accounts of direct, even sustained, engagement that clarified unacceptable behavior while remaining respectful, and even humorous.

Leadership qualities that were identified were: inclusion (race and gender specifically), openness, clarity in communication, ability in their task(s), and forward focus. All of these leadership qualities fit best under a personality that would “bend over backwards to help” rather than “boast”, and was consistent in the ability to “inspire.” Sharing leadership responsibility and tasks, and openness to further development as a leader were important to Ben. This sharing and openness extended beyond the church as well, seen in his appreciation
for outside experts and resources that have helped educate and clarify the church’s expectations and direction. While these resources were important, most of his leadership currently seemed to be rooted in emulating his adoptive mother and father, as well as pastors he held in high esteem. Mentoring and modeling shaped most of his preferred approach to his current expressions of leadership.

Service was woven throughout the responses and narratives in this semi-structured interview. Stories of serving the needs of the sick, elderly, poor, visitors, his family, the church community, the local community, and international mission trips permeated each response. With a hint of humor, the following quote captures a great deal:

…it sounds corny, I see myself as a servant. Not so much as a leader. I guess, if you looked at it like you’re supposed to, which I try to do, God’s the leader and we’re the servant, and you try to bring others to Christ… I don’t look at myself as a leader here at the church. Even if I’m chairman of the deacons… I feel like I am just someone here to help, to inform, not so much what I think is right or needs to be said or done, but to inform what I have learned. But, at the same time to be open minded enough to learn what that person is trying to tell me too. And they can be just as much of a leader as me, and sometimes a lot more so!

Disagreements and conflict were included, but did not supersede Ben’s overall impression of his church, “Don’t get me wrong, the folks that go to this church are wonderful.” While no formal conflict resolution plans or steps were elucidated, he consistently included narratives of his personal intervention when issues and differences of opinion were present. He typically spoke directly with individuals, committees, and even the
larger church body when appropriate. These conversations indicated a desire to establish more realistic expectations, greater involvement from the participants, and actions that matched the ideas.

**Sam Edger, Sunday School Director.**

The interview with Mr. Sam Edger was one of two for this study that was conducted in the participant’s residence. When asked to tell about himself, he began with current vocational references, moved next to his present church setting and affiliated denominations, then to his hometown and locales for his education. Upon reaching his undergraduate education in that chronology, he shared a story about his dual degrees and dual settings that included Business Administration and Christian Studies. These two degrees were indicative of his vocational experiences that included church staff positions as a youth minister, as well as crisis management with multiple state governments.

Even though he “shifted gears” after his college years from paid church positions to secular employment, he has found “there’s a lot to be said for being active in a disaster environment. I mean you have…tragedy, loss…emotion…hurts. A lot of people that you can talk to and work with…it’s sort of a secular setting…but still there is a lot of ministry.” This outside experience and interest had a natural outlet in his current church’s service groups, a connection that led to his initial formal leadership positions. Sam spoke of helping with “a lot of presentations and brought in guest speakers…to help us as a group to understand disaster relief.”

In relating the experience of his becoming a Christian, Sam depicted his involvement in a “large youth group” with “lots of opportunity for education.” Of particular importance
was a youth concert that this group hosted. There was a time of “invitation at the end” of the concert for people to “walk down front.” Even though Sam first thought, “You know, I’m not going to do that. I’m not going to go along,” he soon felt compelled to act: “Before I knew it, I was walking down to the front” and “that was the point of decision for me.” He expressed the importance of the youth pastor who worked with him during that time, recalling his name specifically later in the interview. An unusual co-occurrence was Sam’s diagnosis of chicken pox at the end of that weekend. The diagnosis resulted in a medical quarantine for two weeks. With unexpected time to reflect, his dissatisfaction with scattered sources for his faith led him to want to sit down and read the Bible from cover to cover… I took a Bible that my grandmother had given me… Once I had got into the habit, I just continued on with it and made it all the way through.

Included with this story were the varied reactions of his friends to his public profession of faith. “Obviously” his church friends supported him, but friends that “didn’t go to church at all” were less supportive: “I met with a lot of, I don’t know what I would have called it then, but ridicule.”

Very active at Mountain Crest Baptist, Sam works with the children, music, men’s service group, and is the Sunday School Director. As Director, he tries to be “early on a Sunday morning” and remain “visible and available,” especially to visitors in order to “catch those people, welcome them, meet them, get to know them, but then help them to get to a class that makes sense.” This weekly role goes along with a responsibility to the teachers who have a quarterly meeting. Functioning somewhat as a communication conduit between
“class participants or teachers” and the church staff, he points out that “we do have good two way communication.”

Sam noted a multitude of programs that the church provides; including worship, youth group, kids and adult mission groups, athletic teams, and small group Bible Study. He then included:

We are just concluding a visioning process. And the interesting thing about that is that prior to that, we all thought everything was great; everything was exactly where it was supposed to be, that we were doing what we were supposed to be doing. But I think what we found as a result of that visioning process is that inwardly everything is excellent, outstanding; is healthy and nurturing. But, it’s all sort of focused on the existing church membership. …we were realizing that all of that good stuff was happening inside the four walls of our church, and we really were not sharing that blessing; or really doing as much as maybe we could do in terms of outreach to the community or missions projects…We’re growing individually, we’re growing spiritually, we’re growing physically…we realized we could do a better job of ‘going and telling’, and allowing our church to grow to have that aspect of our ministry.

Sam used an example of a children’s activity that was held literally out in the parking lot, instead of in the building as it had been in years past, to describe the new effort to be “more open, more accessible…, more visible to the community.” Addressing his own observation that “people come from so many different backgrounds,” Sam recounts that less formal settings where participants can “ask questions”, “reconcile ideas”, and come to “understand it
“a little better” are the fertile ground for people to grow and become “mature enough to say ‘we’ll agree to disagree’” around many issues.

In describing leadership, he included terms like “facilitate”, “consistency”, “committed” and “consensus building.” Speaking of skill sets and competency, he said people had to be “suitable to provide that leadership.” Leaders at Mountain Crest are expected not to be “making decisions for them [the congregants]”, but to ask “What do we want to do as a congregation, as a community of faith. Where do we feel like God is leading us as a congregation?” The outcome of this collective attitude was offered as: “You know, people feel better about any decision if they feel like they’ve had an opportunity to express their concerns.” As a counter point, this broad base of participation was later acknowledged as incomplete to the functional reality of the church, as “the rule of 80% of the work being done by 20% of the people” was still valid “to some extent.”

When considering how change was affected in a previous church, he remarked that “it’s tough” to distinguish between “collaborative” and “manipulative” leadership, especially if there are mutually exclusive choices being made. “Trust… honesty… openness… and an earnest interest in getting to know people” were identified as needed qualities to reduce negative experiences in church leadership.

**Site 2: Highland Park Baptist Church**

Highland Park Baptist Church was started as a collective effort of several local churches in the Breckerville area nearly ninety years ago. On any given Sunday, five to six hundred people gather for services and other programs. Located in a wealthy, dense, and proximate suburb to Breckerville, this church has extensive facilities that are remarkably well
maintained. Traditional in architecture, programs, and worship style, this is the most formal of the three churches included in this study. Coat and tie for the men, and dresses for the women are predominant for weekly worship. On my visit, people were active in their welcome for me, with several congregants making sure I had information, asking if they could help me, and once offering a hymnal to me already turned to the current singing page (I was not holding a hymnal as a gifted song leader at the front introduced several variations to the hymns; men only, women only, whispering, thundering, different tempos. This was well directed, with a strong congregational response.) These gestures occurred at multiple points before, during and after the service, and included printed material that was very detailed. The printed information was clearly intended as a way for discovering additional ways one might engage the church beyond worship attendance.

Exercising a much broader presence among its community than most churches, Highland Park Baptist Church sponsors multiple on site schools during the week which are provided access to its large facility. Each school serves populations that extend well beyond the church membership. Additionally, the television broadcast of the primary weekly worship service is broadcast into tens of thousands of homes in the area.

**Dr. Roger Alderson, Pastor.**

This interview was conducted in a comfortable, well appointed, office regularly used by this pastor. When asked to tell about himself, he began by sharing geographic and family references. His schooling and job opportunities had resulted in moves to several places across the United States. Roger clearly valued his nearly thirty years as “the husband of one wife”, making playful use of a Biblical reference from the Apostle Paul. Describing his present life
phase, which includes married children and grandchildren, as well as his vocation as a pastor, brought clear joy and appreciation to his demeanor.

When asked about Christian milestones, a powerful story was shared which centered in the family of his childhood. A significant transition occurred, which took matters of faith and the church from “almost non-existent” to “pervasive”. His father “stood up one night at home and said, ‘Next Sunday we all go to church together,’ and from that point onward it was a very, very different experience.” Roger’s own public profession of faith followed this parental shift by two years, and was contrasted by the experience of his older siblings that never truly engaged with faith or the church as young people or as adults.

I was intrigued by Roger’s recounting of his leadership roles and experiences in a humble, or demure way. He would begin by minimizing his impact or the importance of positions he had held, then commence to name multiple roles of significance through music, student groups, churches, state, and national level organizations. To elucidate this pattern: “I was not a leader in my peer group at school” was followed by recounting time spent as music director, serving on the governing council of a student group, and internal roles with the band through middle, high and undergraduate school settings. This low key recounting characterized the description of his professional years as well. He told of roles that directly served hundreds of people in the community, and indirectly served thousands; in housing, service, and mission boards.

Freedom was included several times in the interview. “A strong belief in freedom”, “the church has given me that freedom”, and [we want to] give people the freedom to launch mission and ministry” exemplify this attention to the participants capacity to electively
participate in the collective work. Beyond freedom, an “attitude of gratitude”, “high level of devotion”, “motivation”, and competency for both tasks and “ability to organize (and) move people” were included as he related his understanding of leadership.

His work on multiple organizational boards and in five churches has made Roger no stranger to conflict. Infrequent, but pivotal, occurrences of missed and absent communication were recounted across several settings. This “failure of communication” was cited as both a cause of conflict, and a root for escalating it. In one story, congregants withheld viewpoints and beliefs within a broader conversation, causing surprise and confusion when these viewpoints came out later. This experience left him more than just a little wary, as evidenced in his statement: “you can never assume that people are speaking from their heart…when it comes to an iconic [core belief or practice]”.

Identifying core beliefs of his ecclesiastical background came easily to Roger, bringing forth: “priesthood of all believers, autonomy of the local church, separation of church and state, authority of scripture, lordship of Christ, [and] the symbolic nature of the ordinances.” These beliefs work their way into a setting of “centralized government” that was intent on being an avenue of expression, as “every Christian believer is given gifts for service.” A persistent practice of extending “personal invitation” finds its way into his organizational understanding of inclusion, even to what he lightheartedly called “the fine art of begging.”

Several avenues of ongoing education were expressed around his personal and professional leadership development, with the practices of reading, teaching, and attending seminars. Even with a recently emphasized congregational effort to develop “servant
leaders,” he expressed concern that “our church, and many churches like our church, are not
doing an adequate job of developing leaders for tomorrow.” Finding places for people to
develop an “emerging vision” within the shared collective of an “establishmentarian vision”
was a topic that seemed to have a wide range for application, as well as a tension between
humility and boldness. This humility/boldness paradox was evidenced across two statements:
first, that “I have found that in leadership, there are probably no two words that are more
valuable than ‘I’m sorry’, and second, his desire to be more “fearless to confront…when I
see something …that doesn’t serve our organization well.”

Rhonda Walker, Christian Education Committee Co-Chair.

Rhonda was part of the only dual interview of the study. The three of us met in a
comfortable conference room, at the head of a large table with a dozen or more executive
chairs around it. Starting her personal story with location, church, and family, she “grew up
in a small community church” towards the coast as the “youngest of five kids, so what we did
was either related to family, church, or school.” Attending church every Sunday with her
biological family was “a great experience.” These were clearly positive memories for her,
flavored with remembrances of practical realities as well; “with five kids, understand that we
were never on time! [laughter]”. Her church friends were also school classmates, which she
said were “just like extended family.”

Serving in several capacities in her five year connection with Highland Park, she
spoke of “ample opportunity for everyone to be able to plug in.” A recent “time of great
transition within our ministerial staff” highlighted a strong appreciation for their leadership,
as one minister in particular had been “a driving force…in all the educational programs
throughout the church…There was a definite void for a short term on that front, but…we’ve come through that now…everyone pitched in to get us to this point.”

“I felt from the first day we visited that (Highland Park) was a very warm and welcoming church.” Enthused about discovering “a good community Baptist church”, she and her husband found “we had to make an effort to reach out ourselves and to be very persistent…some of the same core groups have been in classes so long, that they’re very comfortable with each other…Our Sunday School teachers were great…I’m glad we stuck with it, because it’s a great place to be.” Participation within the weekly Sunday School of the church has not been exclusively as a student, as she has taught children and youth at various times also.

Rhonda described a leader as someone “who sets standards by example. They not only help determine the mandate, but they live the mandate. They’re willing to step in, and willing to determine direction even when it’s sometimes a sticky thing to do.” Qualities included that characterized leaders were “trust,” “enthusiasm,” “willingness to listen,” “caring” and “loving.” In her leadership roles at Highland Park, she saw a strong contribution “in the programs that we propose, and plan, and line up facilitators for”, as well as “brainstorming” with “an incredibly talented group of people…that’s what I have enjoyed so much.” This brainstorming was “what we were calling the visioning process.” As the group worked on this process, they realized that while “it started out in our team…it was a much bigger question” that may gather “momentum” towards a broader church involvement next year.
Even with several successful outcomes mentioned, she “felt very inadequate in what I have tried to do in the past two years; for the reason I wasn’t exactly sure of what I was supposed to be doing… I feel like I would have been much more effective if I had had someone that I could have had a year under and looked back on and said ‘they did this, this and this.’” Evaluation and assessment extended beyond her personal experience in leadership, as Rhonda included “evaluating what’s offered outside of Sunday School” among her team’s contributions to the church. Out of those assessments, adjustments are made to the programs, and additional volunteers are often asked to participate. Speaking to the involvement of these volunteers with the church, Rhonda said, “I think for members, knowing that one of our ministerial staff has recognized that they could make a significant contribution is very meaningful.”

**Sarah Reed, Christian Education Committee Co-Chair.**

Sarah Reed was part of the only dual interview of the study. Sarah first recalled the “very small country church” that she attended as a young girl. “It’s amazing once you get to my age; you start thinking back on your Christian story, and how much affected me. So, that is one reason why I think it’s so important for us to really emphasize Christian education…I remember the songs that the choir sang…I remember the way the church looked inside, and the teachers; how they taught…the picture and the story. And um, my friends were all from church, and so it made a big impression on me. And, I didn’t realize it at the time so much as now, every now and then I think about a song that I sing, and know that I first heard it in that church. And, I can almost pick out the sound of some of those people.”
“Christian instruction from home” was supplemented with a wide circle of influence for Sarah. She recalled her grandfather’s provision of the actual lumber used in the church building, her aunt’s instructions about when it was appropriate to take communion, and her mother’s recruitment of the choir to watch her during worship. These combined influences extended her biological family to “the family of God” as context for her profession of faith:

I remember when I turned twelve and I went to a revival…and I joined the church that night. I felt the preacher offered the invitation, I felt my little heart pounding. I know exactly where I was sitting. I felt like “it is time”, you know? And so afterwards, I came home and told mother “I joined church tonight”. And as an adult, I have thought, ‘I’m sorry I didn’t do that when mother was with me’ but it just felt like I needed to do that. And when the minister was gonna baptize us, one of the things he said “now I’m gonna baptize you”, and he told us the procedure what would happen and all, and he said “and don’t let your feet float around” [laughter]. So, I wanted to be sure I didn’t do that. But to this day I can remember going down into the water and him being there. And of course my family was all there to support me.

Sarah had the longest tenure of the participants in this case study, about thirty years at her current church. She was “very active” when her children were young, but contrasted her time since the children grew up as more paced: “I always try to keep one role”, which has included teaching, committee work, and singing. In describing Highland Park, she spoke of “opportunities for all age groups”, “super” people, “a friendly church”, and connected “the building of the new family life center” to her sense that “it’s just an exciting time to be here.” Frequent inclusions of staff involvement across the committees and direction of the church
were balanced between an acknowledgement of having both “top notch” and “lackluster” ministers over the years. Grateful in the present, she said “As far as the thirty years I’ve been here, our ministerial staff right now, [and] our lead minister; just absolutely wonderful.” At several points during the interview the topic of age surfaced. One age related comment was, “it has not been very long in the past that most of the members were elderly; you would not think of it as a young church. Yet when you come to church now, I mean, you’re seeing more, and more, young people in the church. And so I’m pleased about that for the growth and future of our church.” The issue of demographic change was acknowledged as difficult sometimes, as “probably each age group would prefer to be the focus.”

“Commitment”, “excitement”, “(people) loved them”, and “enthusiastic” were included as Sarah described good leaders. “Watching others” was the primary way she learned to lead in the church, but “we’re currently looking at ways to build leadership. We’ve had a leadership conference with another church…they’re looking for ways to enhance leadership…that will be a good thing.” In addition to references of praxis, Sarah included theological underpinnings: “if they see God’s leadership…God’s voice…then they will be successful”, and “none of us really own the church, and none of us should feel…that our opinion is the most important.” This difference of opinion, “you have that a lot in Baptist churches, because you don’t have a hierarchy that’s telling you ‘this is the way it’s going to be done.’” Another reason that differences show up is that “most people are very emotional when it comes to religion, their churches. And when they spend a lot of time, commitment, and money, they feel that their wishes should be strongly considered. When they consider it ‘their’ church and not the Lord’s church, you just have to keep reminding them the central
Another example of theological attribution surfaced as Sarah discussed a major church project which took two sustained efforts to accomplish. Sarah said of the first attempt, “I guess it wasn’t God’s time.”

A story drawn from her history in Baptist churches spoke of the potential for different priorities among members:

There was a… group in our church…It was a fairly large group, [but] it wasn’t half of the church or anything like that. They held leadership roles, they were enthusiastic, they gave, they had wonderful leaders. But, then, their idea of what they thought the future of this church should be was different from the majority of people in our church…It was unsatisfactory, in that it was, it was a group that was working outside the majority of what the church wanted, and what the church’s history had been. Even though they were wonderful leaders, the church did not want to go down that… path.

The lack of a structural hierarchy that extends beyond the church, such as a system of bishops or denominational control typical of other denominations, sometimes results in “conflict that you have to go through.” This reality had at times left Sarah “disappointed.” However, “conflict can bring blessings”. One potential positive result she noted was “vacancies of leadership” that allow for “others that have some skills sitting on the sideline” to become involved. Another positive is the “opportunity to understand why it’s a conflict and to have discussions…if it caused you to go home and study, it was a good thing.”

Elements that are strong at her church currently include, “missions outside of Highland Park Baptist”, a church wide emphasis “encouraging Bible study”, and strong avenues of
communication like “a wonderful newsletter. Everything is out there, you just have to look for it.”

**Site 3: Edgetown Baptist Church**

Edgetown Baptist Church is the youngest organization in this study, approaching twenty years since starting in a small storefront. Initially setup as a mission church under the auspices of another local Baptist church, the church outgrew the storefront and found a second site to meet. Gaining strength enough to warrant independence, the church constituted and looked for a permanent site. Placed in a sprawling suburban area that is functionally a separate township from the nearby metropolis, the congregation is a mix of middle class and understated wealth. The buildings are only about ten years old and are well maintained. The overall facility is significantly overbuilt for parking and sanctuary seating relative to the current congregation size. During my visit, several people greeted me, or asked if I was a visitor. A full range of ages were present, with a large and visible youth group collected in a nearby section of the sanctuary.

**Rev. Jimmy Harrow, Pastor.**

Jimmy offered the use of his office or a classroom for the interview, and we decided to meet in his office at the church. A friendly and engaging presence was quickly conveyed when he met me out in the lobby of the office suite. After we settled in two chairs facing his desk, it became apparent that he would probably have the highest word count of the interviews! He is a gifted storyteller, providing details and commentary with style and speed. Jimmy gave a personal introduction that covered from his birth to his current job in less than three minutes. He included his home town, boyhood church, high school, undergraduate
university, marriage, kids, his vocation, his wife’s vocation, and his kid’s vocations, a few more churches, and a brief history of Edgetown Baptist. Woven through the initial synopsis were several references to “God’s call to the ministry.” By the time he said “that is the Reader’s Digest version of where I started and how I got to today,” I knew this was going to be a rich interview.

Been in the Baptist church all my life. My earliest memory, I mean memory period, is on a Sunday morning; going and crawlin’ up in bed with my dad and layin’ down on his chest and and him saying “which church you wanna go to this mornin’?” Now what that meant was…when I was probably three years old, Ridge Fork started a mission church. And, that’s what they called ‘em then, they didn’t call ‘em church starts. This was a mission church and there was a little store front, a little gas station…I thought that was the coolest place in the world as a kid because it had a, it had a little loft in the back, and that’s where our Sunday school class was. As a three or four year old you could stand up in there, but the adults had to bend over. I mean it was, the ceiling was so low - and I thought that was just, it was like a tree house Sunday school, it really was. And so anytime he would ask me… I would always say “go to the mission” because I thought that was the coolest place in the world.

Jimmy recounted his “profession of faith” at age seven as a response to “what I know to be the Holy Spirit now.” Full of details, he told that it was on “a Thursday night of a weeklong revival” and “I couldn’t stand it any longer, so I went down front and made my profession of faith.” He was soon “baptized indoors at the [nearby] First Baptist Church because it was winter” and “we didn’t have a baptismal pool in that church.”
Moving to his college years,

I used to worry about the fact I didn’t have a testimony. ‘Cause you know, you go to these youth rallies and stuff and these guys come out and say “I was a drunk for thirty years and I was in the gutter with drugs”, and “I was in prostitution, but God pulled me out.” And I thought: “I don’t have that.” You know, I was just some ole guy that went to church, and I never knew anything except God loved me and Jesus was his son and that was my story. And I used to think I didn’t have a real testimony.

During this time he expressed great appreciation for new friends at school, a “really important, core group of Christian brother in my life that I just am convinced that God sent me.”

As newlyweds, he and his wife were unwilling to become “permanent visitors” in a church, and quickly joined and became very active: “whatever needed to be done, I volunteered for it.” His career as a firefighter was developing well, as he was gifted on the policy and education side of the job as well as the technical side. He steadily rose up through the ranks, eventually holding the second highest office for his field in state government. His plan began to change though, toward a yet unseen vocational path:

I think it was about page 24, (the author) made this statement. And it says that, and I’ll paraphrase some, and it says that God didn’t call you to a ministry, a job, or a task. He called you to a relationship with Jesus Christ. Now you would think somebody who was saved at seven and had been in church all of his life would of somewhere along the line have it go through his thick skull that it was about relationship. But I wasn’t living that way, I wasn’t living that way at all. I was, what I
call now ‘knocking myself out for Jesus.’ You know, I would, if, if, oh, I know the doctrine if anyone talked tried to stand up and talk about salvation by works I’d a beat you right down about that you know. I’d argue with you about that. But, in reality as I look back on it now, I’m doing a lot of what I think, what I see a lot of Christians doing, what I see a lot of our church members right here doing, and that is trying to please God through works. Please God by just knocking myself out for him. That ole, that ole thing about being there every time the church doors are open you know, and every time the lights are on I gotta be there. And I was doing, I got real convicted about that. I got real convicted about this idea ah, it wasn’t relationship for me, it was about seeing how much stuff I could do, seeing how many positions I could hold, and, and that kind of thing. And so, God really got a hold to me about that. I didn’t just stop everything I was doing; it wasn’t that kind of thing, but he just wouldn’t leave me alone about that. And so I, I really began for the first time in my life to, to get into the word more for me than to study for a Sunday school lesson, or preparing to teach a bible study, or preparing to teach a Sunday school class. I, I, (was) getting into the relational instead of academic kind of thing. And, uh, and God began to do something right there. That, that’s, if, if I had to go back and tell you when God first planted a seed for a call in my life was in that hotel room… right there on that Saturday night. That’s where he first planted a seed of call in my life…[this] seed of call in my life…stayed in my mind for, probably at least the better part of a year before I would even voice it, before I would pray about it….I continued to study and read…I did begin to pray about it, and I talked to Lelo [his wife].”
Affirmation came via his wife, Lelo, and two close church friends, but it was a scripture passage that gave him “peace” about a career change:

   It was Isaiah 41, and it said, “I have called you from the ends of the earth, haven’t rejected you, don’t worry about it, don’t fear, I’m going to, I’m going to hold you up with my righteous right hand.” And I uh, I just went down on my knees and said “Okay, I got it, I got. You’re calling now, not later.”

   There have been several places where Jimmy’s “very structured and very logical” approach was stretched by the practice of his faith. After his wife replied “I’ve…been wondering how long it was going to take you to figure that out” regarding his readiness to move to ministry as a second career, he still had to proceed. His next thoughts were:

   Okay, we’re on board together now [he and Lelo]…I always said that I was going to make a list, and on the left hand it says “Things we know”, and on the right hand it says “Things we don’t know.” The only thing on the left hand side of the list was: “God’s called us.”

   Shifting the narrative towards the church he is a part of, Jimmy described Edgetown Baptist as “a wonderful place”, “different”, “eclectic”, “unique”, “we don’t have a lot of tension that’s in so many of the Baptist churches today”, and as a place for “understanding, celebrating, and embracing women in ministry…I can’t limit who God can call…our church embraces that.” Retaining freedom was included at the church and individual levels. The “loss of autonomy of the local church” in regard to the state assembly was reason enough for their eventual separation from that organization. Within the church, among individuals, there
is a desire “to be able to express how I feel and not have somebody attack me for it.” This freedom allows for a setting where

we may not agree doctrinally on the same thing, but …I’m going to respect you enough to let you voice your opinion, and you let me voice mine, and we can still live together in unity even though we don’t share the same opinions on everything. And I think that’s really important…It’s unity not uniformity by any stretch of the imagination. And I think this church may get that. And I believe whole heartedly that’s what the scripture teaches. But I think this church may get that better than other churches. Now, we’re not perfect.

Service and direction were critical in his conception of leadership, saying:

I define leadership as servant leadership…two words I’ve used are servant and shepherd…You don’t lead by demanding, you don’t lead by coercing, you don’t lead in my opinion, um, by rules and regulations and policies and structures. You lead by casting a vision and being willing to do your part to see that vision come about…It’s working alongside more than it is anything else…I hope they would say I am a servant. Not just a servant to the Lord, but a servant to the congregation.

Terms like “heart”, “vulnerable”, “real good intuition”, “credible”, were included to describe a leader. Desire is not the same as ability for Jimmy, seen in this quote: “you have people that are called, but they don’t understand leadership. And, so I think, modeling, mentoring are important things.” Jimmy added that “if you’re going to value people’s giftedness, you must also allow them to fail.”
At one point in the interview, the dialogical reflection highlights a praxis gap in Jimmy’s own understanding of leadership development:

Jimmy: We don’t have a…leadership seminar here…we do things with Sunday School teachers, on how to prepare a lesson and that kind of thing, but we don’t really, that’s, that’s a good point. We don’t really have a formal training program to try to prepare people to lead committees and organizations. Gosh, we probably need that. Probably need that real badly.

TT: So, you, you teach teachers to teach, but…

Jimmy: but, we don’t teach leaders to lead. We model it for ’em and talk to ’em about it. Shew. Probably ought to do that. That’s a good point. Wonder how you can do that.

Jimmy was more confident of their collective development strategy, speaking of a “process of discernment, a process of revisioning…to make sure God’s in it.” With “vision,”“intentional” leadership, and a perspective that “people are much more inclined to listen if they know you love them,” pastor Jimmy and Edgetown Baptist are discovering “how they can be the presence of Christ right here in this community.”

Jimmy’s frequent use of maxims, colloquialisms, and metaphors are worth including:

1. Referring to resolving difficulty: “By what I call ‘plowin’ around the stump,’ we have gradually changed that mind set.”

2. Responding to TT: Is there anything else you wish I had asked? Jimmy: “There’s nothing burnin’ in my bosom.”
3. About another pastor: “This pastor…his goal was to reach retirement. Unfortunately his retirement was, like, 15 years away.”

4. His sense of timing: “I’m afraid they are way too late. I don’t know…I think the horse is out of the barn now.”

5. Delegation and failure:

Is it easier to do it by yourself? Absolutely, because sometimes when you depend on someone - it don’t happen. I mean that’s just a fact of life…to give folks a task, let ’em go, let ’em fail if they need to. If that happens [pause], you know? But pick ’em up, dust ’em off, and put them back in the game, you know? That’s what God does with me, you know? I fail him all the time. But praise the Lord he forgives me, and dusts me off, and puts me back in the game to go do better next time…so we do.

**Olivia Smith, Sunday School Director.**

This interview took place in one of the church’s education rooms; a logical place for Olivia to suggest, as she has served as a Sunday School teacher and director in multiple churches. Olivia was the only interviewee that had served as both a deacon and a leader in the education structure of her church. This breadth of experience was demonstrated in her stories, as they spanned many facets of church life.

Her personal narrative began with some specifics about the place and setting of her growing up years; a rural, farm based life where gender roles were very distinct. Her parents “got us ready for church every Sunday, dropped us off at church, and came back and picked us up.” Her mother was a Christian believer that later became involved with the church, but her father was decidedly resistant to all matters of faith until his later years. Speaking of her
original family of eight, Olivia said “we’ve been a close knit family”, despite her father’s marital infidelity and her realization that “he was an alcoholic.” Her mother insisted with her children that “we must pray for him.” Olivia said that she did pray, even as she stayed minimally connected with him for much of her adult life. In his eighties, her father became responsive to “the Lord Jesus Christ,” and surprised his children by stating “Jesus is my friend.” Olivia describes him after that as “a changed person” whose “temper” and “cursing” no longer defined their interactions.

The story of her decision to be a Christian was vivid and full of detail:

One night one of my sisters and I were talking, after lights out; all five of us slept in the same room. Donna said something about being a Christian, and I said “why are you a Christian?” and she said “cause I gave my life to Jesus… I said “How did you do that?””, and she said “I just prayed and said ‘Jesus, I want you to come into my heart’” And I said “Can I do that?” And she said “Yeah, why don’t you do that too.” I said “OK”, so we did, and that Sunday we told the preacher.

This led to a memorable baptism experience that she shared with some of her siblings: “In fact, I’ve got a picture of five of us going into the ‘waters of baptism’ in ole’ Mr. Bob Clayburn’s pond!”

When asked about her church, Olivia first shared several stories from previous churches which highlighted reasons she valued her current church. Four leadership ideas that repeated across several stories were that of care giving as a priority, congregational involvement, competency, and a strong expectation of moral behavior.
Olivia and her husband were previously attending a church where “things were not going well.” This was in part due to the church “being run the way older churches were run, that is, you have six or eight deacons, and they manage the church, you know? They were the business arm of the church.” Edgetown Baptist, however, “is organized so much differently. When we started at this church, they didn’t even have deacons, they had ‘caregivers’.” A separate group, called the church council, contained “the people that made decisions.” Connecting past and present, she said, “we still have only the church council [for administration]. The deacons only “deac”, they only serve. They do not run the church.” Her appreciation for this structure shows again as she claims, “if our governing body was the deacons, we wouldn’t be anywhere near where we are now.”

Around the concept of wide participation and involvement, she expressed displeasure with a previous church where “two or three families…just kept everything stirred up. If you didn’t do exactly my way; either you see it like this; that kind of thing.” Another story involved a previous pastor who resisted bringing things to the gathered church. Asking only individuals, “he’d go to the next, the next, the next, and then, before you know it, he had something passed and he didn’t even have a meeting on it!” Speaking about a relative’s church where the staff had hired a new minister, she commented, “The congregation had no say in it whatsoever. I don’t like that.” Clearly favoring wide participation, she praised three current practices of Edgetown: the receiving of names from the congregation for deacons, regular meetings where “if you have ideas of things you want to see the church do… you come and tell us about it”, and the fact that the administrative meetings were open for anyone to come and listen or bring a concern.
Competency and strong morals were consistently included in Olivia’s requirements for leadership. A preacher “who only had one good sermon” and a story about a deacon whose living arrangement left the impression of sexual impropriety exhibited situations that invalidated leadership in her view. Qualities that made for strong leaders were “vision,” ability to “articulate”, being “wise”, “people [who] get things done”, “consistently being who you appear to be”, “loyalty”, “know[ing] how to delegate”, “work[ing] hard”, “encourage[ing]” and “faithfulness”.

Olivia’s enthusiasm for her church and its people ring out in the following excerpt, “I really just love this church…it has such caring, Christian people. We are a very caring church. We care for anybody in the church or outside the church that has problems.” And also, “I want people to feel welcome…cared for…important and valued.”

**Corey Dunlevy, Moderator.**

Corey Dunlevy was one of two participants that offered the use of their home as the site for conducting the interview. A warm and humorous, yet reserved, countenance was observed through the interview, corroborating his description of himself as “more analytical and introspective, and not too much of a talker.” Corey opened the interview with some brief inclusions that located his geography, denominational background, family and vocational trajectory. He had several ongoing leadership settings beyond his church that ranged from volunteer work with his homeowner’s association to his second career as an accountant. His role at Edgetown has included both teaching Sunday School and a term as a deacon, but his primary involvement has been as moderator.
He places a public profession of faith at “about twelve years old I think when I
dwalked down the aisle at First Baptist Church, Queensbridge…That’s when I accepted
Christ…and been a Baptist ever since.” Quickly including denominational connections in his
story, he added that he was “Not a very fundamental Baptist; more of a moderate.” When
asked what that designation meant for him, he added,

It means that I don’t subscribe to some of the very strict Southern Baptist
interpretation of scripture, I suppose. Things that I object to are the exclusion of
women from positions of teaching, deacon, positions of leadership in the church,
which is true now in a lot of the Southern Baptist Convention churches. Edgetown is
Cooperative Baptist Fellowship, and that one, I think gives a lot more personal
freedom to the individual believer to have the range of beliefs that they have
personally, but yet still fit in within the congregational mission, and activities, and
worship.

Describing Edgetown Baptist as a “committee led church” that is “pretty much open
to almost anyone who wants to come”, he is “grateful” for the “fellowship” and “caring
members” that maintain a “good working relationship” across the staff and lay leaders. He
attributes this in part to the fact that “many of the members of Edgetown have come from
other churches where dissention, strife and splitting has occurred. And they came to
Edgetown looking to get away from that.” Internally, he frequently made reference to the
church’s willing to dialogue openly, as “it seems like there’s an exchange of ideas” and as
moderator, “I always give everybody an opportunity to speak up on the issue that they want
to.” Externally, a wide range of mission and service opportunities moved the work of the
church beyond its membership: overseas and regional work with “poverty”, a “dental bus ministry”, “English as a Second Language”, and “prison ministries”.

Important elements for a leader are to “exhibit the spiritual life in their behavior”, appropriately “exercise your influence and the authority of the position”, and extend involvement beyond “the responsibilities that they have in their job description.” Corey described a change over time in his understanding of leadership as,

I have basically seen the wisdom of being more of a facilitator, and an inclusive type of leadership mode, as opposed to trying to basically get the people to go in the same direction that you always want to go. [laughter.] I think the more that you have in terms of buy in and participation, the more effective you can be as a leader; certainly in a church setting where it’s a strictly volunteer thing. If the will of the group is not there then you’re not going to be effective at all.

His own journey into positional leadership came through “thought”, “prayer”, and “a real calling” within an expectation that the moderator role would be “a growth experience for me”. He spoke of adjusting his public demeanor over his time as moderator to “more of a casual style”. This came about in part because

the pastor that I had when I first took that position set me straight on a few things [laughter]; that I was being a little bit too much a stickler for Roberts Rules for example… In a church setting and I had to realize that, although our bylaws said that you needed to follow Roberts Rules in our business meeting that that doesn’t mean a strict interpretation of them, that people have to stand up and repeat this, that, and the other, you know and what have you. It had to be more of a casual style than I was
probably, originally intending to use. So I learned a little bit from him for sure in that role. But I guess, you know, my life experience in leadership positions has lead me to the style that I felt like was most effective and I think the roles that I had with this local community position, and the role that I had in the business with my wife, kind of helped me change my view and style of leadership from what I had when I was at the computer company.

“Freedom…that fits within the Baptist tradition” was expressed as a valued reality in his current church. In contrast, Corey told of pastors that I’ve seen and experienced that [were] trying to be more of a dictatorial policy setter…I don’t think you can be an effective pastor that way. I don’t think that’s Christian. I don’t think that’s what Christ would want. It’s too narrow. It’s too exclusive in many respects. It doesn’t allow so much for the priesthood of the believer, which I believe is the Baptist tradition…certainly for a lot of people that’s not what they want. It’s not to say that there are a lot of people that are perfectly happy with that, but it’s not for me.

**Descriptive Case Overview**

The three churches included in this case study shared several factors that unified them as one case; primary was affiliation with the Cooperative Baptist Fellowship, additional factors were comparable size and structure. The four guiding principles of the CBF, soul competency, church freedom, Bible freedom, and religious freedom, gave initial indication of a shared organizational understanding with Invitational Leadership Theory. The CBF has
complimentary, but technically distinct, organizations at the state and national levels that provide assistance to churches in the area of missions, information, training, and fellowship.

Descriptions of a church’s size often focus on weekly attendance, total membership, or budget. As this study was interested in the functional organization of the given churches, weekly attendance averages were most relevant. These three churches range from three hundred to six hundred people in average weekly attendance. The leadership structures were similar across each of the three churches with six to twelve vocational staff, and a much broader organizational structure made up of lay leaders and committees purposed with different administrative, education, and ministerial priorities as their focus.

A brief demographic questionnaire was provided to each of the interview participants, which is available in Appendix D. Pastor tenure ranged from one to fifteen years with their present churches. Lay participation with their current churches ranged from four to thirty years. The ratio of gender inclusion was about two males for each female interviewee, with ages ranging from thirty-seven to seventy years. While the participants were sought based in particular roles of service such as education and administration, these participants had participated in many additional roles ranging across age groups, mission service, and facility maintenance. All interviewees expressed a strong commitment and involvement within their churches. Individual participant’s ages ranged from thirty-seven years of age to seventy years of age. Questionnaire responses are available in Table format in Appendix E.

One category within the questionnaire responses yielded unexpected value. While this study sought to document leadership experiences from nine people across three churches, the participants were collectively able to draw on experiences from twenty-seven churches where
they had held formal leadership positions. Even more additional churches were mentioned within the interviews where participants had previous involvement, but no formal positions of leadership. These additional churches are difficult to quantify, but easily push the collective, direct, church involvement of the nine interview participants to well over thirty churches. The experiences, stories, opinions, memories, priorities and perspective shared represented a much broader Baptist experience than was expected by this researcher.

These constructed narratives and general demographics are vital to the first identified purpose of this study, to document leader experience. Qualitative research methodology acknowledges a rich discovery process that is both iterative and structured. The nine interviews, three participant observations, and supplementary documents bring this case study to life as means to address the primary research question, “What does leadership look like through the lens of Invitational Leadership Theory in three Cooperative Baptist Fellowship affiliated churches?” The findings presented in Chapter Four as constructed narratives showed that ILT was reflected heavily in the experiences and practice of Baptist leaders affiliated with the CBF.

The narratives included many references to values, perceptions and general philosophies that are of interest to RSQ1 (see Table 1) and the category of Foundations. The Assumptions of leadership that RSQ2 addresses, were quickly evident through analysis of participants responses concerning their definitions of leadership. Interview questions (see Appendix D) related to leader’s growth and learning expectations were clearly relevant to the Dimensions category, and RSQ3. The narratives did not cleanly match the ILT construct for Dimensions however, and a full exposition of the effort to resolve this is included in Chapter
6. RSQ4 asked about Areas of relevance to the leaders and organizations, and the narratives were saturated with topics like Places, Policies, and Programs. Missing components of church life began to be evident in the narratives as discussions about priorities and resources were intermixed with known ILT components. Outcomes, relevant to RSQ5, for many of the included stories were rich with layers and complex meaning for participants. Even though a story like Mountain Crest’s location change was depicted as having both ‘beneficial’ and ‘lethal’ consequences, the ILT structure still resonated with participant recollections of times where invitation was evident, and times that were clearly dis-inviting. Recognizing that things do not always go as desired was not a stretch for the participants, and they were all able to speak to conflict and resolution, the focus of RSQ6. This strong support across all six major categories set the stage for more specific attention via coding and analysis.

**Chapter Summary**

The purpose of this study has been to broaden and document the understanding of leadership in Baptist churches, and to assess the degree to which Invitational Leadership Theory reflects that understanding. Chapter Four has utilized constructed narratives and descriptive information to record the experiences of nine leaders and their context. Their stories are rich with detail, vitality, and personal significance; so much so, that even through the expressive methodology of qualitative research, only a portion of their life experience can be captured here. To compliment the highly narrative data presented in Chapter Four, Chapter Five presents findings drawn from coding and analysis of the interviews, participant observations, and affiliated documents. Chapter Six presents assessment and conclusions
relevant to Chapters One, Two, and Three, making use of the findings presented in Chapters Four and Five.
CHAPTER FIVE: CASE ANALYSIS

This chapter presents findings and analysis in three groups: general themes, paired themes, and analysis specifically related to the six research sub-questions. The narratives in Chapter Four established a broad base of similarity between the school and church settings as the primary research question is addressed: “What does leadership look like in three Cooperative Baptist Fellowship affiliated churches through the lens of Invitational Leadership Theory?” Chapter Five takes a more theoretical style of analysis compared to the narratives of Chapter 4. Both chapters present findings that corroborate the bulk of ILT remaining valid in a church setting, with differences still falling within the six major categories. Comprehensive conclusions and discussion will follow in Chapter Six.

General Themes

As this study sought to broaden understanding of leadership in Baptist churches, the data analysis allowed for emergent themes to arise. In addition to hand coding, computer software was utilized for analysis. The software utilized, ‘NVivo 9’, allowed for graphic visualizations of data, nodes, themes, summaries, and language. “Node” is the term used by the NVivo 9 software to delineate a grouping of materials or ideas. Quotations and concepts were first placed into nodes, and later conceptually sorted into themes. Table 9 presents the conceptual themes generated by open and in vivo coding, and the included nodes that compose them.

Nodes were identified through open and in vivo coding, and then processed through interpretive software as a way to give them a ‘second look.’ The literature review prepared the researcher to be watching for words, symbols, and practices that conveyed significant
meaning to the individual. Nodes were selected using some objective measures of use and frequency, but were also set out by how the interviewee used the words. For example, “God was calling me now. Not later, but now” is a quotation from EBJH that includes the idea of *calling*. In this instance, calling is not only a frequently repeated word, but the urgency of it is shared with the narrative, and the proximate and repeated “now”. Multiple passes through the transcriptions yielded dozens of nodes that were compiled into six themes: theological, community, priorities, education, provision, and style of interaction. These themes capture large constructs of organizational understanding and practice for Baptist churches. Several themes, such as theological, community and interaction style, speak to process and content aspects of identity. Other themes, such as priorities, provision, and education, speak largely to resources and outcomes that embody the shared ethos of the churches. The presence, and saturation, of these nodes and themes bolster the conclusions in Chapter Six relating them to existing ILT categories. A summary of the nodes and themes is presented in Table 9, below.
Table 9  
*First round coding, themes and nodes.*

<table>
<thead>
<tr>
<th>Themes</th>
<th>Nodes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Theological</td>
<td>God, Jesus, Spirit, faith, calling, purpose, inspired, worship</td>
</tr>
<tr>
<td>Community</td>
<td>Care, congregation, family, relationship, community</td>
</tr>
<tr>
<td>Priorities</td>
<td>Mission, vision, change, tradition, goals, task, opportunity</td>
</tr>
<tr>
<td>Education</td>
<td>Education, teach, learn, mentor, school, student, study</td>
</tr>
<tr>
<td>Provisions</td>
<td>Money, skill, competence, time, energy, sanctuary, building, room, capital, health</td>
</tr>
<tr>
<td>Interaction Style</td>
<td>Open, service, freedom, communication, trust, respect, invitation, welcome, talk, fail</td>
</tr>
</tbody>
</table>

The first theme revolved around theological constructs. Whether attributionary, descriptive, explanatory, or definitive; theological language wound its way through most conversations. Some of these were expected to be present going into the study, such as the inclusion of ‘God’, ‘Spirit’, and ‘Jesus.’ Additional constructs that were less expected, but were pervasive across the data included ‘calling’, ‘worship’, and ‘inspired’.

Visual representations of narratives, called ‘word trees’, quickly convey both saturation and density, while preserving the original voices of participants. These word trees are literally made up of statements and notations drawn from interviews and field notes. The graphics give striking visual clarity to the use of a given word, idea, or node; conveying frequency as well as contextual cues evident in large branches of similar phrases. As this
section elucidates the themes from Table 9, one exemplary word tree for each theme is included within the main body of the text. Additional word trees representing other nodes within each theme are presented in the Appendices. Appendix G visually compiles hundreds of theological statements centered on the words “faith”, “calling”, and “Spirit”.

Figure 3, below depicts the pervasive inclusion of the word god across the data. People included God as an intimate actor in their lives, as well as a distant force that shaped the world. The word trees can identify categories together, as the phrase God is… is completed with branches to “calling”, “doing”, “leading”, “love”, “planning”, “real”, “so good”, “working”.
Figure 3: “God” word tree
Theological inclusion was complemented by human connectedness. Four nodes coalesced into a second theme called ‘community’; the nodes were care, congregation, family, and relationship. Across the theme of community, several facets linked the people to their environments. There were connections of geography, biology, friendship, employment, care giving, and shared activities like worship, fellowship, and education. These references were often mixed and matched in their actual use, but the importance of connection was consistent. The theme of community included personal connections such as friendship and biological family, as well as impersonal connections like geographically defined neighborhoods and cities. Figure 4, below, demonstrates the saturation of the word community in the interviews. The theme of community and the theme of education were the only two which were direct applications of a word that appeared within the nodes and also captured the import of the themes. For this theme, community was actually identified as a node, along with words of similar meaning, like ‘congregation’, actions that took place within community like ‘care’, and parallels that define the word for the user like ‘family’. Appendix H presents additional word tree graphics that were included within the community theme.
Figure 4: “Community” word tree.
The connectedness of community was central to what developed as the next theme, Priorities. This theme grouped the nodes of mission, vision, change, tradition, goals, task and opportunity. All nine interviews spoke of consistent and sustained effort collectively expended by their churches towards the clarification of priorities. Opportunities, direction, individual preferences, novelties, traditions, and visions from God were constantly shifting from the main current to an undercurrent in organizational life. In the ‘mission’ word tree, Figure 5 below, different usages of the word can be deduced. Mission can be a purpose, “you see it’s a good mission”, or mission can indicate a task or event, as in “mission trips to Argentina”. Appendix I depicts phrasing and frequency of “vision”, “change” and “worship” representing the theme named Priorities. All of these nodes were couched in discussion of activities and importance, and conveyed the priorities of the speaker and the church as they spoke.
Figure 5: “Mission” word tree.
Education was anticipated in the formulation of this study, as the original literature review presented the church as a learning system. The results were overwhelmingly affirmative of this view of the church. Education is the second theme that takes one of the nodes as its namesake, along with community. It could be argued that education would fall within the theme of priorities, but it was so consistently present, a separate theme is worthwhile. Only one word tree is included for this theme, Figure 6 shows a word tree for “education”. While only one word tree is presented, this theme did draw from a wide range of words that had to do with education, such as “mentor”, “coach”, and “learning”. Though present and meaningful for the participants, the semantic prevalence was not dense enough to create visually striking word trees.
Figure 6 “Education” word tree.
‘Provisions’ brought together the nodes of money, skill, competence, time, energy, capital, physical property, health, and age. These nodes addressed the needed resources to accomplish the work and intentions of the church. Tangible and intangible, relational and material, amassable or fluid, it was evident that the assessment and acquiring of resources was a needed part of sustainable efforts. Appendix J shows usage of three key words within the Provisions theme: money, building, and sanctuary. These were necessities for doing the work of the church.
Figure 7: “Building” word tree.
The previous themes, priorities, and provisions related to the work and setting of the church. Interaction Style, however, is a theme that includes process oriented dynamics of the church. Appendix K shows the saturation for “serve”, “talk”, and “relationship” as used in the data, while Figure 8 is included here in the text to show how powerful the concept of “open” was. Open was used to convey relationships of trust, polity and processes that were democratic and inclusive, as well as a descriptor of acceptance in phrases like “open your heart.” This theme captured how people wanted to interact with each other and their church.
Figure 8: “Open” word tree.
In addition to thematic compilations such as Table 9, one particular category grew into a sizable and informative list: desired leader characteristics. One interview question specifically asked participants to describe a leader. While this specific question garnered many descriptive terms, there were nearly as many descriptors sprinkled throughout the interviews as other questions were answered. Direct descriptors took the form of humble or credible, while indirect descriptors might be couched in a story, like “I was disappointed when he did that”, which was interpreted as a negative reaction to a lack of trust. The Kouzes and Posner list in Table 5 has been researched heavily, and was presented in order of preference for more than seventy five thousand respondents. Table 10 presents descriptive terms, similar to Kouzes and Posner’s list, gleaned from the transcripts and printed materials. Unlike the Kouzes and Posner list, Table 10 terms are in no particular order.
Table 10  
*Preferred characteristics of leaders within Baptist churches (no implied ranking).*

- Reliable
- Honest
- Hard working
- Relational
- Authentic
- Loving
- Caring
- Trustworthy
- Inclusive
- Open
- Good communicator
- Competent
- Forward focus
- Humble
- Inspiring
- Facilitator
- Consistent
- Committed
- Democratic
- Inclusive
- Enthusiasm
- Listener
- Exciting
- Responsive to God’s leadership
- Servant
- Shepherd
- Vision
- Credible
- Intuition
- Heartfelt
- Wisdom
- Good Delegator
- Encouraging
- Faithful
- Spiritual
To recap, seven general themes were identified drawing together many nodes: theological, community, priorities, education, provisions, space, and interaction style. These themes were chosen based in frequency of key word use, consistency across data sources, and subjective interpretation of depth of meaning to participants. Three of these components are not presently identified within current ILT literature: Theological, Provisions, and Priorities. In addition to identifying general themes, the process of analysis revealed that certain ideas held tension for the participants. Versus coding was added to the protocol in order to highlight these paired themes which held tension.

**Paired Themes**

The coding process was iterative, and as the initial analysis was conducted, it became increasingly apparent that participants typically dealt with experiences and expectations within their roles as leaders that appeared mutually exclusive. These contrasting concepts conveyed more meaning when acknowledged together, and additional methodologies were sought to include this discovery. Saldaña posits that “versus codes identify in binary terms the individuals, groups, social systems, organizations, phenomena, processes, concepts, etc. in direct conflict with each other” (2009). The implementation of this additional method clarified the presence of additional Themes in comparison to the original conceptual map of ILT. Actual quotes from the interviews generated many of the topics found in Table 11 below.
<table>
<thead>
<tr>
<th>Themes</th>
<th>Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priorities</td>
<td>Tradition vs. change</td>
</tr>
<tr>
<td>Priorities</td>
<td>Youth vs. Elder</td>
</tr>
<tr>
<td>Priorities</td>
<td>Church environment vs. world [secular]</td>
</tr>
<tr>
<td>Priorities</td>
<td>Rational vs. irrational</td>
</tr>
<tr>
<td>Provisions</td>
<td>Skilled vs. called</td>
</tr>
<tr>
<td>Provisions</td>
<td>Granted authority vs. earned authority</td>
</tr>
<tr>
<td>Process</td>
<td>Staff vs. layperson</td>
</tr>
<tr>
<td>Process</td>
<td>Autocratic decisions vs. collaborative</td>
</tr>
<tr>
<td>Process</td>
<td>decisions</td>
</tr>
<tr>
<td>Process</td>
<td>Individual action vs. collective action</td>
</tr>
<tr>
<td>Process</td>
<td>Unwritten rules vs. written rules</td>
</tr>
<tr>
<td>Process/Priorities</td>
<td>Priesthood of the believer vs. vocational ministers</td>
</tr>
<tr>
<td>Process/Priorities</td>
<td>Freedom vs. limits</td>
</tr>
<tr>
<td>Process or Policies</td>
<td>Formal vs. informal roles</td>
</tr>
<tr>
<td>Programs</td>
<td>Journey vs. destination</td>
</tr>
</tbody>
</table>

As the reader reviews these paired findings, it is important to note that they are better understood within this study from a post-positive perspective, recalling Bandura’s discomfort with dualities (1999). The apparently dichotomous presentation here is not invalid, as it preserves the way many of the participants actually conveyed their experiences of leadership.
in the church. While this research intended to use systemic, post-positive language, some conceptual pairings of the participants strike a positivist tone. Including them serves a core qualitative research objective of preserving the participant’s voices (Patton, 2002). Table 12 presents exemplary narratives in the same order as the summary given in Table 11. The participant’s viewed the pairings in diverse ways. Many participants were thinking critically and sorting out whether one idea was better or more needed than another, as MCBP did while speaking of journey versus destination. EBOS’ inclusion of formal and informal roles showed a different use of a pairing, as she was not changed by the components of a conceptual pairing, but merely recognized it as descriptive.
<table>
<thead>
<tr>
<th>Topic</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tradition vs. Change</td>
<td>“There have been numerous times when we have said ‘Don’t you think it’s time for us to set that on the table?’ and so forth, and ‘Absolutely not.’ There have been a couple of occasions, in an effort to breathe some new life into it, [they] have changed the program up altogether, and that doesn’t work uh, uh, uh. ‘Let’s do what we’ve always done’.” HPRA</td>
</tr>
<tr>
<td>Granted authority vs. Earned authority</td>
<td>“There is granted authority. Sometimes that granted authority is sort of a temporary thing; ‘We’re going to give this guy a chance, see what he’s made of.’ Then there’s earned authority. I think, I think many times…leaders assume that granted authority is the same as earned authority. Granted authority, is you know, the search committee came and found me, presented me to the church…That’s one thing. But you know, then after a period of time, there has to be that sense that people say ‘OK, we’ve seen the person, we’ve witnessed the persons behavior, lifestyle, the way he or she approaches something, and now we trust the person.’” HPRA</td>
</tr>
<tr>
<td>Formal vs. Informal roles</td>
<td>Things get done “through the responsibilities that they have in their job description, where they’ve taken on roles of leadership. But so many things are; people just see something needs to be done and they go do it.” EBCD</td>
</tr>
<tr>
<td></td>
<td>[About a task she and her husband have done for many years.] “We still do it, we love it, it’s not a burden to us…They finally made it a ‘job’.” EBOS</td>
</tr>
<tr>
<td>Topic</td>
<td>Examples</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Journey vs. Destination</td>
<td>“Churches have been so focused on the destination that they’ve forgotten the journey. In my practice, in my understanding or experience, um, it’s, the finish line has been helping a person become a Christian. And once you get them dunked, it’s done! You know we haven’t helped them to be formed into the likeness of Christ and to become a disciple. And so they focus so much on the destination, the journey you know before and after has been kind of you know, you know, just kind of neglected.” MCBP</td>
</tr>
</tbody>
</table>
| Church environment vs. World [secular] | “Some people were just so supportive you know? They were, ‘Ah man, I tell you, that’s just great, it’s great.’ And others, I remember our division director…she called me into her office, and I sat down, and she looked at me she said, ‘Have you lost your mind?’…she said, ‘I understand this thing about being a Christian I, I get that.’ She said, ‘This is crazy’.” EBJH  
“You get into that whole ‘man world’ versus ‘God’s world’, and that’s frustrating. Even though you’re supposed to learn here and take it there, that’s very hard to do.” MCBW  
“You’ve got a social aspect; you’ve got all these different aspects. The most challenging thing to it is that you really have to make good decisions that keep everyone happy, but at the same time are still following the Spirit and enabling the church to achieve its mission and its potential, you know, as the body of Christ.” MCSE |
<p>| Staff vs. Layperson           | “Some things get done around here because individuals take it upon themselves that ‘I want to see this happen’. And then some things get done because people like me on the staff, say ‘you know, we’ve gotta do this’ and I’ve gotta find a way to get it done.” HPRA |</p>
<table>
<thead>
<tr>
<th>Topic</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priesthood of the believer vs. Vocational ministers</td>
<td>“Mostly it was pastors that I’ve seen and experienced that just weren’t effectively being a pastor… more of a dictatorial policy ... I don’t think you can be an effective pastor that way. I don’t think that’s Christian. I don’t think that’s what Christ would want. It’s too narrow. It’s too exclusive in many respects. It doesn’t allow so much the priesthood of the believer, which I believe is the Baptist tradition.” EBCD</td>
</tr>
<tr>
<td>Freedom vs. Limits</td>
<td>“I like to think that we are a fairly free church, that umm, that if you really want to do something and it’s generally within the framework of Christian work, umm, and you’re not stepping on a lot of other people’s toes that are already supposed to be doing some of that, we usually give you the green light and say go.” HPRA</td>
</tr>
<tr>
<td></td>
<td>“Edgetown is Cooperative Baptist Fellowship, and that one, I think gives a lot more personal freedom to the individual believer to, uh, have the range of beliefs that they have personally, but yet still fit in within the congregational mission and activities, and worship.” EBCD</td>
</tr>
<tr>
<td>Autocratic decisions vs. Collaborative decisions</td>
<td>“Certainly I, I think there’s a place, a time and a place, that a decision has to be made. A leader has to say…’this is what I feel like we need to do’...And they look for you to say ‘OK, this has gone on long enough: It’s time to fish or cut bait - one or the other’..but I tend to be much more collaborative in my leadership style.” MCBP</td>
</tr>
<tr>
<td>Individual action vs. Collective action</td>
<td>“This is something that we’re trying to change. You have a history of the same people saying, ‘If that needs to be done, if you can unlock the church sat morning, I’ll come by and do that myself.’ I think now, through our committees, we’re trying to get more people involved.” MCSE</td>
</tr>
<tr>
<td></td>
<td>“In many ways, there is a centralized government, whereas I’ve been in church, again, where there is a lot more individualism.” HPRA</td>
</tr>
<tr>
<td>Topic</td>
<td>Examples</td>
</tr>
<tr>
<td>------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Unwritten rules vs.</td>
<td>“Baptist polity is not supposed to be hierarchal in a sense…(but) the congregation working together. But, the reality is, there are times when you have to make some decisions without waiting to the next meeting.” MCBW</td>
</tr>
<tr>
<td>Written rules</td>
<td>“You know things are going well, you know, from…a lot of openness to doing things even if we don’t necessarily follow the proper procedure of getting everybody to check off on it” MCBP</td>
</tr>
<tr>
<td></td>
<td>“I had to realize that, although our bylaws said that you needed to follow Roberts’s rules in our business meeting that that doesn’t mean a strict interpretation of them.” EBCD</td>
</tr>
<tr>
<td></td>
<td>“Proper procedure” for signs, vs. “ice machine appeared…no permission given, granted, or denied. It just happened.” MCBP</td>
</tr>
<tr>
<td>Rational vs. Irrational</td>
<td>“So at one point I always said that I was going to make a list, and on the left hand it says, ‘things we know’ and on the right hand it says, ‘things we don’t know.’ The only thing on the left hand side of the list was ‘God’s called us.’ There was a lot of things down there we didn’t know what to do with. You know, didn’t know what that meant.” EBJH</td>
</tr>
<tr>
<td>Skilled vs. Called</td>
<td>“What happens there is you have people that are called, but they don’t understand leadership. And so, I think modeling, mentoring are important things there.” EBJH</td>
</tr>
</tbody>
</table>
Table 12 (continued)

Narrative examples of paired topics

<table>
<thead>
<tr>
<th>Topic</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Youth vs.</td>
<td>“We’ve got different age groups going on. But a large portion of our congregation is sort of within the same, older, age group. A lot of them are on the same wave length anyway.” MCSE</td>
</tr>
<tr>
<td>Elder</td>
<td>“Is a new person, a young person with new ideas, with young ideas, are they going to come in and change the way we’ve been doing it here for the last fifty years?” MCSE</td>
</tr>
<tr>
<td></td>
<td>“I think there’s opportunity for all age groups, although probably each age group would prefer to be the focus.” HPSR</td>
</tr>
</tbody>
</table>

Further discussion of the paired theme results will occur in Chapter Six. In anticipation of this discussion, it is helpful at this point to acknowledge that most of the themes from Tables 11 and 12 were determined to fit within the existing categories of ILT of ‘Areas’ and ‘Outcomes’ (Figure 1 and Appendix N). For example ‘written rules vs. unwritten rules’ would correspond to Policies in the Areas category. Specific attention was given next to the previously identified sections of ILT, and those findings are next, guided by the research sub-questions.

**Invitational Leadership Theory Components by Research Sub-Question**

The primary Research Question for this study asked what Invitational Leadership Theory looked like in Baptist churches. This section presents findings that fall within the six major categories of ILT; Foundations, Assumptions, Dimensions, Areas, Outcomes, and Conflict. The information presented in this section provides confirmatory examples for all identified ILT components. One aspect of the Foundational level, Self Concept, was markedly weak, while the Dimensions category generated options for a different structure.
The data for a complimentary concept of theologically based self efficacy will be presented here in relation to Self Concept, as well as the alternate inclusions relevant to the Dimensions research sub-question. Figure 1, repeated in Appendix N, provides a visual guide to the six major components and their sub-fields.

“What foundational concepts undergird leadership within a Baptist church?” – Foundations, RSQ1

The Foundations category of ILT, found horizontally along the bottom of Figure 1 and Appendix N, is made up of Self-Concept Theory, the Perceptual Tradition, Democratic Ethos and Education Living. Self concept is important to ILT because “behavior is mediated by the ways an individual views oneself and serves as both antecedent and consequence of human activity” (Purkey, 1991, p.5). Similar to Bandura’s use of the term self efficacy, this theoretical stance views the internal beliefs about the self to be the true pivot point for external behavior (1999). Beliefs include internal perceptions like whether or not they are capable, acceptable, motivated, etc. In the course of analyzing the data, self concept theory and perceptual tradition are very descriptive of what you might see, or expect, but the source, the why does not match churches very well. Theology changes the understanding, and a little bit of the expression of efficacy.

The concepts of ‘calling’ and ‘giftedness for service’, as well as theological attribution like “God dusts me off”, frequently placed the individual’s understanding efficacy squarely in the expression of God’s favor or blessing. With this consistent expression, self efficacy has been replaced in Appendix O with “Theological/ Christological basis for self
efficacy.” Perception theory remains in place as there was wider agreement from the interviewed leaders with that view of lived experience.

Democratic ethos was pervasive, consistent, and strongly expressed by the participants. The desire and effort expended towards keeping communication “open” and participative strongly supported this ethos. These Baptist leaders, especially the pastors, were well aware of their shared democratic polity, but the ethos ran thick discussing how priorities should be decided, corrective action should be undertaken, or involvement in the worship and ministries of the church. Organic images of the “body” and collective references like “congregation” were extensive.

As strongly expressed as the democratic ethos, Educational Living was also pervasive, consistent, and strongly expressed. Weekly opportunities for all ages, long term educational themes, church wide educational themes, multiple resources, and many other educational outlets reinforced that education was not just an approach, but an ethos. One of the few intentional leadership training opportunities revolved around teaching and supporting teachers in the betterment of their role. Democratic ethos and Educational Living were added to the ILT construct after many years of development, and certainly are reflected within this case study. The four foundations warrant individual attention and correlation with the church data.

**Self concept.**

Self concept theory is less tangible than concepts like buildings or conversations, because it has to do with the internal justifications and beliefs a person holds. Even when asked how good and bad leadership experiences affected the view of self, these church
leaders were not very convinced, or possibly not very aware of this kind of justification for behavior. Roger Alderson said he “hadn’t really thought about it”, while Sam Edger said “it continues to be a challenge” to incorporate outside expectations. Whether these represent truly exclusionary data, or simply a lack of that kind of conscious fodder for decision making is hard to say.

What was evident, was the reality of theological understandings that were offered as justification for action. In Appendix O, Self Concept Theory was replaced with ‘Theological/Christological understanding of self efficacy’. An understanding of personal beliefs and behavior in response to engagement with God, Jesus, and the Holy Spirit was pervasive across the interviews. Terminology like “calling” and “service”, processes like “prayer” and “discernment”, efficacy based in “opportunity” and “giftedness” firmly attributed behavior and perceptions of the self as derivatives of the relationship with the deity. Jimmy Harrow exemplified this by not attributed his views as his own, but rather something learned from God when he said “God did it with me” as justification for giving others a second chance.

**Perceptual.**

The perceptual tradition is referred to as the “bedrock” of Invitational Education (Purkey, 1991, p.5). ILT literature involves the perceptual tradition in a similar manner, drawing on it as a philosophical approach for understanding what can be seen. Explaining it as a tradition that maintains “human behavior is the product of the unique ways that individuals view the world” (Purkey, 1991). Relevance to a leadership theory comes by recognizing that people are always acting based on how they alone interpret the world. While the semi-structured interview questions did introduce the terminology of perception with the
participants, the participants commonly used it to describe perceptions of both interpersonal connections, as well as perceptions of the church as an organization. The following quotations demonstrate commonalities with the perceptual tradition:

I agree with that statement because perception becomes reality for a lot of people. You don’t live on the perceptions, you, you, focus on what can be observed, um because it’s hard to change perceptions. Interesting story that just popped into my mind: When I came to (a previous church served), the church was located across the street from a high school… and the first couple of weeks I was there…I called the principal of the high school to say, to introduce myself and to invite her to… build a relationship between the church and the school. And I called over there and the secretary answered and she put me on hold. The first thing out of the principal’s mouth when she picked up the phone was ‘What have we done now?’ And that let me know that there was a cantankerous relationship between the school and the church, the only time the church would call the school was if there were students either on the property of the church doing things they weren’t suppose to be doing or something else happened, you know Friday night football game and the next morning the parking lot trashed, you know those types of things. And the perception was that, you know, we were neighbors with one another but the only time we had communication was when something was wrong. And that probably was the reality for her and her experience. So, we had to rebuild that relationship between the church and the school. That’s just a case of where, ah, the perception, you know, the church claimed “we
want to be all things to all people and reach out to our neighbors” and that kind of thing. The reality was it was just stuck. MCBP

It’s always important to me how Highland Park is perceived…First of all, when you say you’re Baptist…they look at you as though you are one of those strange Baptists they see on TV…They have no idea what a Baptist is…they have no idea what a wide range of believers…are in the Baptist denomination. HPSR

I guess that could have been open and above board, but it didn’t look very good. EBOS

I think that perception is reality in many respects. EBCD

Because whatever people observe, perception is what they take home. I mean you and I can observe the same thing and have two totally different perspectives and perceptions about it so yea and I think it’s incumbent upon us to explore perception. And not just assume perception. We can’t assume because of what we did, people are going to take it that way. EBJH

These narrative quotations contain incidents where leaders knew that their assessment of a situation did not match the assessment of the person they were working with. As one pastor worked with the nearby school principal, history and precedent had given the principal a different view of a mid day phone call than the recently arrived pastor considered when making that call. Perceptions of morals, intentions, and level of appropriateness differ across
these examples as well. The inclusion of perception theory in ILT keeps this potential gap in the forefront of the leader’s experience, because it can change “what they take home” EBCD.

**Democratic Ethos.**

A democratic polity was understood to be present at the outset when including Baptist churches in this study. The strength of a democratic *ethos*, however, is slightly more nuanced. Final decisions are attributed to polity, with a singular narrative across all of the interviews where a church vote was close on a significant issue and left a sour taste in the mouths of those involved. The greater majority of data involved a very wide base of inclusion, openness, and participation that ran well past formal polity. The following quotes demonstrate these expectations.

“You don’t run the church, the congregation does. I mean, they’re paying you, you’re supposed to be working *with* them, and pleeeease get out of this frame of mind you’re in.” MCBW

“Building and grounds used to, they have, according to the constitution they can go out and buy stuff the church needs, etc. etc. I said ‘No, that’s not going to work because you’ve got 8 to ten people going out to decide what to buy, spending money.’ We’re going to take it to finance committee, and bring it to this committee and then we’ll take it to the church. If we’re buying a light bulb, that’s different, but if we’re going to buy a computer that costs two or three thousand dollars, or buy a play set that costs twenty or thirty thousand, everybody in the church knows about it.”

MCBW
“You know, being a Baptist church, it’s congregational polity…in order to do a lot of things you have to have the blessing of the church, which means sometimes it takes some time to get some things accomplished, to reach a consensus with the congregation... Baptist polity is not supposed to be hierarchal in a sense…(but) the congregation working together. But, the reality is, there are times when you have to make some decisions without waiting to the next meeting. But that’s pretty much it; congregational polity.” MCBP

It’s more of “We’re here to serve you. What do you want to do?” Or, “What do we want to do as a congregation, as a community of faith? Where do we feel like God is leading us as a congregation? What are we thinking?”, and I, as a full time church staff member will help move us in that direction. It’s a very supportive role. I think more so than, what I see in the private sector is you have those high level decisions and the direction is handed down. MCSE

You know, people feel better about any decision if they feel like they’ve had an opportunity to express their concerns. And I see that in government, and in private sector, and in church work as well. If someone doesn’t like something, and they’re able to express that and share that, it seems to me like most of the time they’re ok in the end with the final decision as long as they were a part of that decision, even if it’s not the direction they wanted it to take. MCSE
I didn’t think she was such a great leader from the standpoint that she did all the work. And a good leader doesn’t seize the opportunity and take that away from other people. EBJH

As participation and openness are evident across these quotations, one should also note individual and ecclesiastical autonomy. A strong sense of freedom to choose, to participate, to voluntarily associate as individuals and as churches came across; strongly supporting a democratic ethos. This ethos carried with it the obligation to serve, as well as the obligation to offer others the opportunity to serve. A unique dance of role sharing between initiating ideas, managing projects, and hands on work becomes evident as leaders ask for feedback, and congregants involve themselves in every phase of organizational life.

*Goal of Educational Living.*

Learning was pervasive across the entire case. Formal learning, informal learning, self directed, mentors, mentees, groups, academic, social, experiential, and more were all present across the narratives. Several of the high frequency words related to education are shown in Table 13, presenting word usage and frequency as indicators of saturation within the interviews and notes.
Table 13
*Educational terminology word count results*

<table>
<thead>
<tr>
<th>Term</th>
<th>Word Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>School</td>
<td>273</td>
</tr>
<tr>
<td>Learn</td>
<td>101</td>
</tr>
<tr>
<td>Teach</td>
<td>76</td>
</tr>
<tr>
<td>Study</td>
<td>68</td>
</tr>
<tr>
<td>Educator</td>
<td>51</td>
</tr>
</tbody>
</table>

Beyond usage counts, the interviewees told of educative programs and people which generated great personal meaning. Not always beneficial, this meaning making included negative experiences. Situational teachers, mentors, were especially meaningful to many, but not always in a positive way. Ben Pollard shared formative, meaning filled experiences with his mentors, recounting both attraction and repulsion. Participants consistently used the language of education, and the documents collected during participant observation corroborated their emphasis. The bulletins, newsletters, and inserts were predominantly filled with information about opportunities for all ages to learn, and teach, their faith. Weekly programmatic approaches to education, such as Sunday School, were just the tip of iceberg, with small groups of every description intentionally learning. Service groups were teaching and learning about needs and solutions. There was even an awareness of broad based concepts like ‘wisdom’ that would show up in the hallways and the business meetings. The following interview quotes demonstrate this broad usage:
• I’ve helped with a lot of presentations and brought in guest speakers. You know to help us as a group to understand…what to expect and what you’re going to be a part of. MCSE

• It was a big church, large youth group: lots of opportunity for education. MCSE

• I say that Amelia and Beau are the wisest two people in our church, or have been consistently from the beginning. There are others that are wise now too. EBOS

• Going from there to where Rob was…helped to shape kind of an evolution of how I viewed the pastor; from a more authoritative figure, to more of a fatherly figure, to more of a collaborative role. MCBP

Similar to the distinction between a democratic polity and a democratic ethos, the goal of educational living stands apart from merely living in an educational setting. Positive attitudes, valuing outcomes, and a pervasive sense of involvement with both sides of the learning experience were reflected in the data. From the four foundations, self concept was the least prominent, with hardly any direct inclusion by the participants. Self perception speaks to the *why* behind behavior. This *why* for church leaders was clearly based in an understanding and practice of faith, which will be explored as a substitute for this component of the foundations in Chapter Six.
“What are the core values/elements/assumptions necessary for Baptist leadership?” – Assumptions, RSQ2

The second research sub-question guided discovery for the Assumptions category of ILT. Borrowing from the literature review discussion of alternate leadership theories, this particular section of ILT captures qualities and characteristics that are possessed and expressed by the leader and the follower. It would even be accurate to call these relational currencies in an economy of community. Table 14 demonstrates the Kouzes and Posner list of qualities alongside those identified in the case study data.
Table 14
Comparison of desired leader characteristics.

<table>
<thead>
<tr>
<th>Kouzes &amp; Posner’s Characteristics List (ranked highest preference first)</th>
<th>Case Study Leader’s Characteristics List (not ranked by preference)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Honest</td>
<td>• Reliable</td>
</tr>
<tr>
<td>• Forward Looking</td>
<td>• Honest</td>
</tr>
<tr>
<td>• Competent</td>
<td>• Hard working</td>
</tr>
<tr>
<td>• Inspiring</td>
<td>• Relational</td>
</tr>
<tr>
<td>• Intelligent</td>
<td>• Authentic</td>
</tr>
<tr>
<td>• Fair minded</td>
<td>• Loving</td>
</tr>
<tr>
<td>• Broad minded</td>
<td>• Caring</td>
</tr>
<tr>
<td>• Supportive</td>
<td>• Trust</td>
</tr>
<tr>
<td>• Straightforward</td>
<td>• Inclusive</td>
</tr>
<tr>
<td>• Dependable</td>
<td>• Open</td>
</tr>
<tr>
<td>• Cooperative</td>
<td>• Good communicator</td>
</tr>
<tr>
<td>• Determined</td>
<td>• Competent</td>
</tr>
<tr>
<td>• Imaginative</td>
<td>• Forward focus</td>
</tr>
<tr>
<td>• Ambitious</td>
<td>• Humble</td>
</tr>
<tr>
<td>• Courageous</td>
<td>• Inspiring</td>
</tr>
<tr>
<td>• Caring</td>
<td>• Facilitator</td>
</tr>
<tr>
<td>• Mature</td>
<td>• Consistent</td>
</tr>
<tr>
<td>• Loyal</td>
<td>• Committed</td>
</tr>
<tr>
<td>• Self controlled</td>
<td>• Democratic</td>
</tr>
<tr>
<td>• Independent</td>
<td>• Inclusive</td>
</tr>
<tr>
<td></td>
<td>• Enthusiasm</td>
</tr>
<tr>
<td></td>
<td>• Good listener</td>
</tr>
<tr>
<td></td>
<td>• Exciting</td>
</tr>
<tr>
<td></td>
<td>• Responsive to God’s leadership</td>
</tr>
<tr>
<td></td>
<td>• Servant</td>
</tr>
<tr>
<td></td>
<td>• Shepherd</td>
</tr>
<tr>
<td></td>
<td>• Vision</td>
</tr>
<tr>
<td></td>
<td>• Credible</td>
</tr>
<tr>
<td></td>
<td>• Intuition</td>
</tr>
<tr>
<td></td>
<td>• Heartfelt</td>
</tr>
<tr>
<td></td>
<td>• Wisdom</td>
</tr>
<tr>
<td></td>
<td>• Faithful</td>
</tr>
<tr>
<td></td>
<td>• Spiritual</td>
</tr>
</tbody>
</table>
Comparing the desired characteristics from Table 14, above, shows many similarities. This combined list is presented to demonstrate the potential range that the Assumptions category could assimilate. The original, and revised, concepts in ILT are understood as malleable by the definitions and usage of each term.

The five assumptions of ILT, trust, respect, intentionality, optimism and care, were strongly identified throughout the data. Table 15 includes the markers from Table 8 for reference, and presents examples from within the Baptist church leader’s experiences which reflect commonality. Additional notes or contraindications are infrequently included, relevant to discussions in Chapter Six.
### Table 15
**Narrative examples for Assumptions**

| **Trust** | Delegated power.  
|           | Interdependence.  
|           | Relationships valued.  
|           | Believability.  
|           | Shared use of expensive tools. |

“I think, ah maybe, ‘authenticity’ would be the word that comes to mind. Umm, you know just being real. The opportunity to be real, to trust each other enough. You know, especially in a smaller settings and one on one setting. The ability to really share what’s going on in life and to trust each other with that information.” MCBP

“There’s a trust factor there, that, these are the people who are elected to do it, so let’s let them do it.” HPRA

“Those people that know how to delegate, I think they create leaders.” EBOS

| **Respect** | People are able, valuable, and responsible and should be treated accordingly.  
|            | Security.  
|            | Shared benefits.  
|            | A chance to learn by mistakes.  
|            | Ongoing investment/development. |

“Typically they find a leader that, um, enables them to do those things which they value… and so the first thing that came to mind when you asked the question is permission giving…there was a lot of experimentation, of ‘let’s try some different things and see how they go.’ And that that has kinda sparked a new desire to try some things that are different, and if we fail, that’s ok.” MCBP

“Everyone is very respectful and very open and very conversational about discussing differences of opinion and kind of hashing those things out in a healthy way in a class.” MCSE

“If you’re going to value people’s giftedness, you must also allow them to fail.” EBJH
Table 15 (continued)

*Narrative examples for Assumptions*

<table>
<thead>
<tr>
<th>Optimism</th>
<th>People possess untapped potential in all areas of human endeavor.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Hope for beneficial change.</td>
</tr>
<tr>
<td></td>
<td>Everything counts.</td>
</tr>
<tr>
<td></td>
<td>“We found a new pastor… He’s just an inspiration in himself, I mean he really is. He has gotten more people inspired and excited. And we’ve got people joining the church back again.” MCBW</td>
</tr>
<tr>
<td></td>
<td>“And I’m sure that everyone probably has some abilities that are not necessarily fully, fully tapped into.” HPSR</td>
</tr>
<tr>
<td></td>
<td>“I think part of what we’re realizing that there are other church members that are capable, whether they think they are or not, that could be pulled in if they’re willing and they’re interested.” HPRW</td>
</tr>
<tr>
<td></td>
<td>“We’re finding more and more opportunities around us…That’s big, that’s big stuff, that’s what God’s doing, we’re not doing it.” EBJH</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Intentionality</th>
<th>Involves conscious decision making.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Gives meaning.</td>
</tr>
<tr>
<td></td>
<td>Purpose and direction.</td>
</tr>
<tr>
<td></td>
<td>“I would even say tradition is a value to this congregation, um, there is great meaning found by the members of this congregation, especially those who have been here awhile to the…traditional worship experience with hymns and… the sermons…That corporate experience is important.” MCBP</td>
</tr>
<tr>
<td></td>
<td>“He can build a service that makes sense, and sort of integrated and cohesive. And that the message we’re conveying that morning, it can all work together.” MCSE</td>
</tr>
<tr>
<td></td>
<td>“I just think that if they’re going to lead groups, there has to have been some kind of purposeful determination that they are foundationally capable of doing that.” EBOS</td>
</tr>
<tr>
<td></td>
<td>“One of the things we’re going through now is a discernment process as to what are the next steps for us as a congregation.” MCBP</td>
</tr>
<tr>
<td></td>
<td>“We are trying to create an environment to allow the leader to be born in many of the people in our church who haven't yet seen themselves as a leader.” HPRA</td>
</tr>
</tbody>
</table>
The quotes above demonstrate that all of the Areas from ILT are found within the experience of Baptist leaders. While there were positive examples for each category, Chapter 6 will offer some alternatives that may characterize the church even better. One expectation of the researcher going into this project was that the word ‘love’ would substitute for ‘care’ from the ILT formulation. The word ‘care’ was very widely and significantly used by all participants, so much so that it could be determined that when churches use the word ‘love’, they are in large part describing the care that is possible between the Deity and their fellow congregants.

“How are leaders developed?” – Dimensions, RSQ3

Analysis continued for Dimensions of ILT, looking for ways that leaders might be encouraged to grow, develop, or simply stay healthy and balanced. Exemplars of the four
dimensions, self personally, others personally, self professionally, and others professionally were present in the data. Table 16 includes quotations that demonstrate a presence of the four Dimensions.

Table 16
Narrative examples for Dimensions

| Inviting Self Personally | Take up a new hobby.  
|                         | Read a good book.  
|                         | Exercise.  
|                         | Visit friends.  
|                         | Dream of the future.  
|                         | Rejuvenate.  
| “My mom, she’s been a Christian lady all her life, she’s been a deacon and all that kind of stuff too. If I wanted to learn something, I would go to her if I wanted to know something about the Bible. If I wanted to learn how to kick a ball or wreck my car, I’d go learn that from dad! [laughter]” MCBW  
| “Lifelong Detroit Tigers fan. A long suffering person [laughter].” HPRA  
| From interview notes: EBCD, second career as an auditor and chaired homeowners association in a “formative stage”

| Inviting Others Personally | Getting to know colleagues.  
|                          | Use names.  
|                          | Rolodex type network.  
|                          | Friendly notes.  
|                          | Remember birthdays.  
|                          | Politeness.  
|                          | Share ideas.  
| “The big thing that I find about church, is even though, everybody comes, they want to talk and think it’s wonderful and all that. But if you don’t have somebody that you can fall back on, or you can talk to, it sucks. I mean you get in a tight spot or something, and you don’t have anybody to talk to, well…then that’s just not an atmosphere that the church needs to be.” MCBW  
| “Someone gets sick, someone has a surgery, then the foods starts coming and the whole bit.” EBCD

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Table 16 (continued)

*Narrative examples for Dimensions*

“‘I’m a good greeter – I love meeting people. I’m really basically shy…I want people to feel welcome and feel cared for, and feel important and valued, and I think I do a real good job.’” EBOS

From field notes at Edgetown Baptist: the campus had a walking course to promote physical health set up on the grounds, with small devotionals at each station.

<table>
<thead>
<tr>
<th>Inviting Self Professionally</th>
<th>Trying a new teaching method.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Seeking certification.</td>
</tr>
<tr>
<td></td>
<td>New skills.</td>
</tr>
<tr>
<td></td>
<td>Seek another degree.</td>
</tr>
<tr>
<td></td>
<td>Attend conferences.</td>
</tr>
</tbody>
</table>

“‘There are three general hats that I think a pastor wears: one is preacher/teacher, one is pastor in a sense, you know providing care counseling, the other is administration, CEO…that process helped me to discover I had gifts in all three areas, but what I enjoyed most doing had little to do with the administrative CEO hat. And in recognizing that what I value most is preaching/teaching, being the presence/ counseling kind of part, those two hats over the administrative hat. And so that helped me to define what kind of pastor, the kind of leader I wanted to be, where I wanted to use my gifts and service.’” MCBP

“We had a ‘Lead as a Servant’ conference, it was an all day event.”

HPRA

<table>
<thead>
<tr>
<th>Inviting Others Professionally</th>
<th>High aspirations for others.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fight sexism and racism.</td>
</tr>
<tr>
<td></td>
<td>Work cooperatively.</td>
</tr>
<tr>
<td></td>
<td>Give professional feedback.</td>
</tr>
<tr>
<td></td>
<td>Maintain optimism.</td>
</tr>
</tbody>
</table>

“It did me more good to hear the complaints and the headaches and all that than it did to hear all the good stuff. Because I learned…not to harp on stuff, not to criticize, not to tell one person behind another’s back. Don’t get me wrong, I still do it every once in a while. I think the negative part of it helped me more than anything on how we didn’t need that at the church and try to keep the positive end of it.” MCBW

“Hopefully the community can help improve the individuals.” MCBP
Examples of the four Dimensions were plentiful within the Baptist leader’s accounts. These leaders had seen, experienced, and promoted engagement for themselves and others that focused on the personal side, as well as promoted competency and skills that benefitted the organizational side. Even though examples were plentiful, the terminology of the Dimensions category was not ideal for the church setting. While the term “Professional” may apply to vocational ministers, a majority of church leaders and participants function as volunteers. While many of them are “professional” in carrying out their responsibilities, they are not held to the same level of accountability as paid staff.

The Dimensions category has been one of the most stable across time and authorship for Invitational Education and ILT. However, it seemed to be consistently off the mark for this case. A combination of terminology, setting, expectations, role instability, and how the research sub-question was directed left this category in an unpleasant state of ‘almost.’

The original wording for RSQ3 was “How are leaders developed?” The following five situations were drawn from the data to answer this question, but they did not seem to match the content of ILT’s Dimensions:

“I’m not sure how consistent this will be with everything else I’ve said… To some extent you can see the rule of 80% of the work being done by 20% of the people. Even though everyone is important…there is a set number of people that carry a lot of weight.” MCSE

“Not just deacons…understanding, celebrating, and embracing women in ministry. Equality of women in ministry and God, I, I can’t limit who God can call to be whatever He calls ‘em to be. Whether its pastors, or deacons, or teachers, or whatever it is.” EBJH
1. Personal development (reading, prayer and reflection, accepting invitations)

2. Experiential (trial and error) development [participants learned the most here]

3. Observational learning (one way information flow)

4. Mentor/Mentee relationship (true relationship, shared information flow)
   [participants appreciated learning here the most]

5. Intentional development (ex. teacher training, “how to…class”) [limited by opportunity]

These five situations were very useful and are offered here as prurient information gleaned in the process of documenting Baptist leader’s experience. But, it did not seem to address the ILT discovery portion of the research. Figure 6.3 was my second attempt at answering RSQ3 under the original wording, and it builds on Figure 2.8 by adding a third column. In this graphic, I tried to capture the self/others dynamic with an internal/external overlay, but the ILT wording of ‘personal’ and ‘professional’ was simply too different than ‘internal’ and ‘external’ for spiritual matters.

An idea mentioned in the comprehensive discussion earlier in this chapter, ‘Role Instability’, began to be apparent at this point. The blending across discipleship and service did not even remotely capture the breadth of experience from the participants. Stymied, I revisited some materials from the literature review to try and figure out why this was not working. A clarifying sentence stood out: “the goal of invitational education is to encourage educators to enrich their lives in each of four basic dimensions” (Purkey, 1991, italics added). The intent of the Dimensions category had not been captured well in the original
wording of RSQ3. Changing it to “How are leaders encouraged to enrich their lives?” generated the collective of: (1) Physical, (2) Spiritual, (3) Community and (4) Intellectual.

This final rendition captured a ‘church’ version that compared well with the existing ILT concept of Dimensions. The essential dynamics of individual and shared existence, as well as constructs for development fell into place. Realizing this version followed Jesus’ exhortation to “Love the Lord your God with all your heart, mind, soul and strength” was confirmation from the church side, and it matched the comprehensive ILT view of an “enriched” life. In the final conceptual map, Appendix O, the four revised Dimensions are shown in yellow boxes.

“To what extent do Invitational Leadership Theory areas reflect how Invitational Leadership Theory is lived within the organization?” – Areas, RSQ4

The “Five Powerful P’s” are well represented in the data, finding resonance in all forms of conversation, interviews, documents, and physical observations. Areas of Focus highlight key elements in the leadership experience, marking where the ‘rubber hits the road’. Table 17 presents narrative examples for the five aspects under Areas of Focus; people, places, policies, programs, and process.
### Table 17
**Narrative examples for Areas of Focus**

| People          | Every person matters.  
|                 | Social connection.  
|                 | Special events.  
|                 | Encouragement.  
|                 | Morale builder events.  
|                 | “I think the biggest thing is just, for me, as some type of leader, is just touching base with folks and trying to talk with them.” MCBW  
|                 | “Getting to know people. We don’t have leaders who are distanced from the people that they lead” MCSE  

| Places          | Aesthetics.  
|                | Temperature.  
|                | Maintenance.  
|                | Positively worded signs.  
|                | Art.  
|                | Living plants.  
|                | Furniture.  
|                | “An arsonist set the church on fire. 3.5 million dollars worth of damage… How do we deal with the damage to a place where my kids got married, or where my child was baptized, or my husband was buried?” MCBP  
|                | “We spend an enormous amount of capital on the (building)… spiritual capital, mental and emotional capital, and certainly financial capital.” HPRA  
|                | “I remember the way the church looked inside.” HPSR  
|                | From observer notes at MC:  
|                | “Member of the choir came down and adjusted the thermostat when shifting into the congregation mid service.”  
|                | “Our custodial staff is at the end of their ropes, I’m sure, trying to keep everything going, and everything clean… we’re trying to make use of this building for everyone.” HPSR  

<table>
<thead>
<tr>
<th>Table 17 (continued)</th>
<th><strong>Narrative examples for Areas of Focus</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Policies</strong></td>
<td>Management.</td>
</tr>
<tr>
<td></td>
<td>Few, clear rules.</td>
</tr>
<tr>
<td></td>
<td>Stated in the positive rather than negative (“Respect others”, not “No Hitting”).</td>
</tr>
<tr>
<td></td>
<td>“It doesn’t say on the list you have to be married.” (to be a deacon)</td>
</tr>
<tr>
<td></td>
<td>EBOS</td>
</tr>
<tr>
<td></td>
<td>“When things are done in a ‘proper way’ according to the constitution and bylaws, which were written 40-50 years ago and are being revised, ah, we’re going through that process now to try to bring them up to at least a reflection of who we are today.” MCBP</td>
</tr>
<tr>
<td></td>
<td>“There was a need to do something, to either change our constitutional bylaws or change the direction for a particular committee, or solve an issue” EBCD</td>
</tr>
<tr>
<td><strong>Programs</strong></td>
<td>Foster cooperative learning.</td>
</tr>
<tr>
<td></td>
<td>Diverse populations.</td>
</tr>
<tr>
<td></td>
<td>“We’re growing individually, we’re growing spiritually, we’re growing physically, you know through, we cover all the bases. We’ve got the softball team, we’ve got...a program for the children, we’ve got Baptist Men, we’ve got Women on Mission. We’ve got all these programs, all these opportunities.” MCSE</td>
</tr>
<tr>
<td></td>
<td>“We do things with Sunday School teachers, on how to prepare a lesson and that kinda thing. But we don’t really, that’s, that’s a good point, we don’t really have a formal training program to try to prepare people to lead committees and organizations. Gosh, we probably need that. Probably need that real badly.” EBJH</td>
</tr>
<tr>
<td><strong>Process</strong></td>
<td>Context as important as content.</td>
</tr>
<tr>
<td></td>
<td>Not what is done, but how.</td>
</tr>
<tr>
<td></td>
<td>Social reality in addition to task.</td>
</tr>
<tr>
<td></td>
<td>Students both learn and teach.</td>
</tr>
<tr>
<td></td>
<td>Consensus rather than fiat.</td>
</tr>
<tr>
<td></td>
<td>Mutual evaluations.</td>
</tr>
</tbody>
</table>
Table 17  (continued)

Narrative examples for Areas of Focus

“The best example of unsatisfactory leadership…is when people stop talking to each other.” HPRA

“So much work is doubled up, done twice, and so, we’re in the process of re-working that so we are more cohesive and more aware.” HPSR

“One family…really got upset and stood and said things way harsh in the middle of a meeting. This was not at all the church; that’s not the way we do things; that’s not the way we treat each other. And one man who was a new member, I really appreciate him so much, stood and said “Folks, this has taken a turn that is really hurting my heart.”” EBOS

“We need more process in our discipleship training.” EBJH

“There are certain things we want children to learn in their music ministry….Obviously, we would love for each children’s choir to be performance ready every time…it’s more important that they have the experience than that they be a great choir. It’s more important that a child know that his Sunday School teacher truly loves and cares for him than it is for the child to be able to quote every Bible verse that is supposed to be memorized that year. You know. Now, is it important to memorize those Bible verses? Of course it is. That product is important, but what good is that product if that child does not feel a sense of love and nurture from the person that is leading him or her through that?” HPRA

This sub-question pointed to omissions in ILT. The already identified categories, People, Places, Policies, Programs, and Process, remained valid. But, the open, in vivo, and versus coding showed consistent work and attention paid by church leaders to areas here named ‘Priorities’ and ‘Provisions.’ Refer to Appendix K to visually place these additions.

Priorities are seen in other leadership theories as “results” or “purposes” (Goleman, 2000; Kouzes and Posner, 2002). Similarly, team leadership clarifies the need for a “clear elevating goal” (Northouse, 2010, p.252). Leader narratives from this case were replete with
examples of personal and organizational goals, as well as the hard work and sacrifice it often took to arrive at shared goals. The term, ‘Priorities’, was added to capture this emphasis. ‘Priorities’ was nearly relegated to being a part of ‘Vision’ under the Assumptions category, but the two continued to be distinct across the data. ‘Priorities’ functioned as operating values and goals that were valid for inclusion in Areas, because it was focal point for effort, action, and ongoing assessment. ‘Vision’ on the other hand, carried a more trait like meaning, similar to what Kouzes and Posner call “forward looking” (2003, p.25). Using ‘vision’ as a trait allows it to describe interactions between people and organizations. You can not be trust; you have trust. You can not be vision; you have vision. Vision is connected to Priorities, but they are distinguished in the conceptual map.

‘Provisions’ includes time, energy, money, power, gifts of the Spirit, competence, property, capital, and other resources that provide for objectives. ILT has been written and researched primarily for school settings over the years (Stanley & Purkey, 2005). Individual schools are generally part of a school system with a school board, state level funding and influence, and federal level funding and influence. As such, the vast majority of budget and expectations are set far beyond the walls of a typical school. Baptist churches are functionally autonomous; joining together, such as CBF affiliation, is voluntary. Therefore, they decide their own priorities and the resources needed to accomplish those priorities in much the same fashion as businesses and other non-profit organizations. For ILT to be a viable tool for assessing autonomous groups, Priorities and Provisions must be included.

An additional piece that will be noted here in Areas, but did not yield a separate category, is the issue of communication. Communication took many forms in the data; talk,
newsletters, preaching, expressing personal and organizational needs, web sites, Facebook, telephone, bulletins, flyers, and more. A possibility for further exploration is to understand communication as a driver for the whole category. Figure 9 offers a possible expression of its importance to all of the Areas.

![Figure 9](possible_inclusion_of_communication_with_areas)

*Figure 9*

*Possible inclusion of Communication with Areas*

Analysis for this case was not sufficient for a final understanding of the role of communication in the organization of the church. Communication was not included in the full composite graphic of Appendix O, as it is understood as part of the Process category until further research confirms a more prominent place.

The Areas of Focus are the strongest tangible markers of the true intent for ILT to be a robust systemic approach to culture and leadership. Covering the waterfront of user experience, from seating to smells, rules to relationships, engagement to access, the Areas clarify that one prominent weakness can nullify a well intentioned invitation. While there is strong representation here of the five areas in current ILT literature, the open and in vivo
coding have identified two additional categories, Priorities and Provisions, that will be added to the framework and discussed in Chapter 6.

“What are some outcomes of church leadership, both good and bad?” – Outcomes, RSQ5

‘Outcomes’ is a combination of the levels of invitation, and the product designations of Beneficial or Lethal. In conversation with Dr. Purkey, he described a method by which he reinforced this binary understanding of positive or negative outcome. Using blue and orange index cards, participants in his workshops were asked to work with case study like examples and assign a blue (Beneficial) card or orange (Lethal) card to each situation (personal correspondence, 2012). While this method may promote intentional thinking about the effects of their actions by leaders, at least one interview narrative expressed a much more complex understanding of difficult situations. HPSR stated, “Conflict can bring blessings.” She went on to tell of new growth and church starts that arose from uncomfortable situations, as well as opportunities for new leaders to grow when previous leaders were not a good match for the group expectations. These kinds of narratives resist clear ‘Beneficial’ or ‘Lethal’ labels. A dualistic understanding of ‘good’ and ‘bad’ outcomes needs to be tempered as part of modern systems thinking (Mulej, et.al., 2003). Table 18 presents examples from the data to demonstrate that Levels and Products are reflected in Baptist leader’s experience.
<table>
<thead>
<tr>
<th>Levels</th>
<th>Intentionally inviting</th>
<th>Unintentionally inviting</th>
</tr>
</thead>
</table>

“But there is no restriction on the basis of gender or race or background. Whether they’ve been divorced or not, you know.” EBCD

“When you look back at history where you can see that we faced this before, and the decision then was to leave and start again. And we think we’re hearing pretty clearly, ‘We don’t leave this time. We stay and we find ways to connect with the community around us.’ And so that’s where we kind of find ourselves. You know, how do we become a presence in the community?” MCBP

“Keep a positive attitude. To be open to suggestions within the church and to make sure that you listen to what anybody and everybody has to say. Even if it’s the craziest mess you ever heard in your life…you need to listen [laughter]. Oh gosh. You didn’t hear me say that! [laughter] But I hear it all the time!” MCBW

“I think if people come and they feel friendly they will stay… And we’ve had visitors, and they will come for a while, and maybe then they will just, checked us out, just like you did and like I did. And will go somewhere else.” HPSR
Table 18 (continued)

Narrative examples for Outcomes

<table>
<thead>
<tr>
<th>Levels</th>
<th>Unintentionally disinviting</th>
<th>Intentionally disinviting</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>One sided rules.</td>
<td>Demean.</td>
</tr>
<tr>
<td></td>
<td>Lack of manners.</td>
<td>Dissuade.</td>
</tr>
<tr>
<td></td>
<td>False praise (This is good, but…).</td>
<td>Discourage.</td>
</tr>
<tr>
<td></td>
<td>Chauvinism.</td>
<td>Defeat.</td>
</tr>
<tr>
<td></td>
<td>Condescending attitude.</td>
<td>Destroy</td>
</tr>
<tr>
<td></td>
<td>Thoughtless.</td>
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<td></td>
<td>Patronizing.</td>
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</tbody>
</table>

“We’ve got all these programs, all these opportunities, but we really weren’t reaching out to bring in all those people… really when you think about the mission of the church…you know, we realized we could do a better job of going and telling, and allowing our church to grow to have that aspect of our ministry.” MCSE

“I think there are a tremendous number of people here who are very willing to serve, and very capable of serving. I think maybe communication between some of the groups perhaps could be improved.” HPRA

Of another church: “They’ve excluded females and all kinds of things.” EBCD

“Sometimes they work very well together. Sometimes there are ummm, skirmishes, there’s turf protection, territorialism, misunderstandings and so forth.” HPRA

<table>
<thead>
<tr>
<th>Products</th>
<th>Beneficial presence</th>
<th>A summative expression of individual choices among the branches Areas and Levels. Was the outcome helpful and constructive?</th>
</tr>
</thead>
</table>
Table 18  (continued)

*Narrative examples for Outcomes*

“I continue to be amazed at the talents that people have. I didn’t realize they had that kind of talent or background or experience that they could bring to bear in different aspects of church life and service.” EBCD

“There are less than a handful, and I mean five, times that I think ‘I’m really sort of ashamed of that.’ I can name you about three incidents that I wish I never had known about. I don’t mean there was anything terrible about them. It was just personality conflicts or something like that. Only three in twenty years – that’s not bad for a Baptist church [laughter] that’s run by the people.” EBOS

<table>
<thead>
<tr>
<th>Lethal Presence</th>
<th>A summative expression of individual choices among the branches Areas and Levels. Was the outcome reductive and destructive?</th>
</tr>
</thead>
</table>

“When I saw what happened in that setting…I just don’t want that pain to be encountered again.” HPRA

“The associate pastor made it known publically that, ‘I do not want to be the pastor of this church…God hadn’t called me to be the pastor of this church.’ So we appointed a pastor search committee. We begin a process…six months into that process after interviewing three or four different candidates and were moving toward a person, the associate pastor then stood up publically and said, ‘Changed my mind. I wanna be pastor of this church. I think God’s called me to be pastor of this church.’ It absolutely split that church right down the middle. Complete turmoil.” EBJH

There were certainly good and bad outcomes related by the church leaders. More than thirty churches contributed many beautiful outcomes for the interviewees. Those same churches had contributed some ugly outcomes as well. Retroactively assessing them as “inviting” or “disinviting” proved more difficult than it appeared at face value. This difficulty can be hard to distinguish between actual structures and intentions, and the communication...
that occurs to convey them. Disinviting issues and disinviting communication were strong enough in data narratives to sour an experience. The subjectivity of the inviting/disinviting assessment hinders the widespread adoption of ILT across many settings, including the original setting of schools.

One area that is not clear within ILT literature is the impact of organizational limits, definitions, and boundaries that may be perceived as disinviting. For example, how do you assess an incident that appears disinviting, but may actually be serving a greater good? Or an unintentionally disinviting situation where there simply was not time or opportunity to convey a broader understanding of the immediate reality?

Purkey and Schmidt partially address this reality in a discussion of the Area of Respect. “Respect also involves knowing when to invite and when not to invite, when to accept and when not to accept. Sometimes the most inviting thing we can do is not to invite, or not to accept” (1990). Knowing how, or when, or what to do becomes a true art form of leadership that takes time, experience, and possibly repeated mistakes to master when it is nuanced.

Consider public worship services; ostensibly everyone is invited. Just like other public settings, realistically there are protocols, decorum, and expectations for reasons of safety, belief, and tradition. How people experience organizational boundaries and limits can really establish the validity of the perceptual tradition as a foundation, as someone may take offense at this form of dis-invitation. So should we deduce that ILT is only applicable to certain parts of an organization or system? This is reasonable if it is granted that ILT assumes that a system is open, expecting invitation. Yet, this is not true of many organizations, and certainly is not true of every aspect for churches. Public worship is quite open, but the office
of pastor or deacon is less open. It is certainly true that ILT consistently promotes respect for all individuals, including respectful language and behaviors that retain civility and jurisprudence. Reality includes many instances where dis-invitation plays a part. The inclusion of a conflict management rubric is a partial answer to this conundrum, and is discussed next.

“How are problems identified and dealt with in the work of the church?” – Conflict, RSQ6

Conflict found its way into the experience of every participant. The true ‘lethality’ that contradicts the Beneficial Presence intended within ILT, was realized in some instances as friendships, partnerships, and vocations died away. Purkey and Novak spoke of conciliation as the final step in constructing a “framework that emphasizes imaginative acts of hope” (1996). The Baptist leader’s experiences did lay claim to some imaginative acts of hope, while other times, conflict was merely met with acts of survival, or acts of denial. In some instances of spiraling negativity, lethal was met with lethal. Several stories included relational and organizational sacrifice that seemed avoidable.

The stories of conflict were insightful, and sometimes painful. While unreasonable, the desire to include significant sections of these stories, both troubled and victorious, was strong for this researcher. Sometimes the greatest lessons are the difficult ones. As MCBW said, “To tell you the truth, it did me more good to hear the complaints and the headaches and all that than it did to hear all the good stuff. Because I learned a whole lot more of, not to harp on stuff, not to criticize, not to tell one person behind the other one’s back.” Table 19 presents narrative examples that indicate the presence of the Six “C’s” found in ILT.
Analysis of the six “C’s” demonstrated that all six were present in the data, but they did not coalesce into a plan of action as they are presented by ILT. All of the interviews included stories of conflict, and working backward to find evidence of times where someone Consulted, or Confronted was not difficult. However, there was no sense of progression in any of the stories as a way to avoid over-reaction and under-reaction. None of the interviews moved through the Six “C’s” progressively in their accounts of conflict. This is not to say that it may not benefit the church to learn this progression, only that while the components of the Six “C’s” were present in the data, the progressive intentionality of them clearly was not.

Two untethered ideas were alluded to in relation to conflict; communication and humor. Communication was frequently referred to either as a method or a means to help avoid, reduce, and recover from conflict. Humor was included as a way to break the tension and the anxious mood. When Ben described standing up in a deacons meeting and saying “What you gon’na kiss?”, or describing a peaceful resolution that occurred with, “Nobody got body slammed or nothing!”, it was obvious that he could use that as a resource for healing. On the flip side, humor can be another proof for the reality of perception theory; how the hearer interprets the setting and comments can change everything. As Olivia said of one family from a different church, “we’ve known any one of them to just burst out and say, ‘Well, that wasn’t funny!’” Humor as part of a communication pattern can be a double edged sword, use it with caution.
| Concern | Is this an issue?  
| Can it be overlooked?  
| Involve ethics, legality, morality or safety?  
| Am I biased?  

“I don’t know what I’m going to do, I just don’t think I can do it, just don’t think that’s right.” EBOS

“There’s a sense of things are going well, um, we don’t have anything to be concerned about.” MCBP

| Confer | Communication.  
| Understanding among those involved.  
| Room for compromise?  
| Agreement.  

“But every time I ever led it, I’d bring up something. ‘How ya’ll feel about that?’ And there wouldn’t be too much.’ Well, I hate to tell you, but somebody in the church said ya’ll sucked! Now how do you feel about it?’ Jokingly, to some degree. I did find that the more you talked about it, they would really say their opinion. Right now if you go into that deacons meeting, if you can get anybody to shut up you’re doing good. Because everybody tells how they feel on stuff; which is so much better. We have worked through so many problems that way. Not really problems, but just circumstances where somebody wasn’t sure, or felt uneasy about it, or had a little bit of grief about it. I would tell them, ‘If you don’t like it, what are you gonna tell me to kiss? Tell me right now!’ I mean, you know, you got to get it out. We had some that were the quietest people you’re ever going to meet, and they would come out and tell you about it, and have a solution for something. And next thing you know, ‘Why didn’t we think of that?’ I mean, really.” MCBW

“We invited him to our house and told him things that we did not like, and one of them was his sermons. We just did not think that they were Biblically based.” EBOS

“The moderator sets the agenda for the business meetings as well as the council meetings…I always made sure that in the business meetings that
Table 19 (continued)

*Narrative examples for Six C’s of Conflict*

- “we had one item on the agenda which is: anybody can bring any issues from the floor and it doesn’t have to be on the agenda. I always give everybody an opportunity to speak up on the issue that they want to, or make a motion, or provide any kind of report that they want to. That’s an important part of keeping the peace in those sorts of situations.” EBCD

| Consult | Clarification. |
|         | Re-conceptualize problem. |
|         | Is this worth escalating? |
|         | Review consequences of intervention. |
|         | Is time available for reflection? |

- “When you’re asking a question, if you’re communicating a problem, it’s always helpful to leadership to already have some type of solution in mind. Where you, you know, ‘how would you react to that?’ Well, I’ve already thought about it, and the first thing I would do is this…do you think that would be appropriate? Do you see any concerns with that that I might not be taking into account?” MCSE

- “I think at the end of the day it will be a very healthy exercise for the church, because I think there’s a re-affirmation, you know, basic commitments, what we’re here for.” HPRW

| Confront | Attempt at resolution. |
|          | Documentation of issue. |
|          | Assessment of authority and power. |
|          | Explore all options prior to acting. |

- “I finally made a speech in church, and told ‘em that everybody needed to quit whining, that I was tired of hearing it.” MCBW

- “I wish I had more of…the fearlessness to confront…it’s painful, that it’s not a comfortable thing to do. But, when I see something that I truly, that it doesn’t serve our organization well, that I confront it. And I don’t do that, I avoid confrontation.” HPRA

| Combat | Issue based, not personal. |
|        | Verify documentation. |
|        | Last attempt for compromise or new agreement. |
|        | Implement consequences. |
Table 19 (continued)
Narrative examples for Six C’s of Conflict

“If you were to have a person in a leadership position that you don’t want there… how do you approach that person? How do you try to encourage them to step down, or how do you handle that, or how do you deal with that? A lot of times I think it comes down to that expression of “running someone off”, because you don’t know how to handle it when someone is in a leadership position and they’re not doing a good job, or they’re not doing what’s expected of them, or what’s been asked of them.” MCSE

“I was the only one voting no when everyone voted for him to come.” EBOS

Conciliate
Forgiveness.
Willingness to work together again.

“I told them that if they didn’t like the church, that there’s other churches that would love to have them, and they needed to quit complaining. And at the time I was the chairman of the deacons, and kind of did that. And I had a few people come and say ‘thank you so much.’ That one person is still here, and she’s in my Sunday School class, and we get along great.” MCBW

“And then I had one person cuss me out for making that speech. Which was kind of humorous too – and they still go to church here.” MCBW

“I certainly needed a lot of grace along the way.” HPRA

“Keep the peace.” EBCD

The conflict component was a later addition to the basic theory of Invitational Education and Invitational Leadership Theory, added in 1991. The addition addressed the reality that even when done well, the practice of Invitational Leadership does not preclude conflict. Each participant told stories of conflict, affirming the reality that everything does not always go as planned or intended. The quotes in Table 19 are evidence that these levels of conflict management presented by Purkey and Novak are possible and familiar in the
experience of Baptist leaders. While each of the Six “C’s” were present in the data, the intended progression, from lower levels of engagement like concern and consult to higher levels as needed, was not intentional or monitored. When asked directly if there might be an agreed upon approach for resolution that could be applied when conflict occurred, the respondents were unanimous about its absence.

Summary of Case Analysis

Three primary methods were utilized to draw meaning and import from the collected data: in vivo/open coding, versus coding, and axial coding. Much as different lenses allow an observer to look at visual objects through a telescope, these coding methods allow the observer to “see” into the experiences of these leaders from different perspectives. Semi-structured interviews allow the participants sufficient latitude and discretion to frame their own responses. In vivo and open coding allowed the themes and priorities for these participants to be highlighted, presented here in their own words and voice (Patton, 2002). Seven themes stood out from this process: Theological, Community, Priorities, Education, Provisions, Space, and Interaction Style. These themes represent both belief and praxis.

Many of the working tensions and decisions surfaced in discussion regarding how these leaders engage their beliefs and tasks in service to the church. Topics which had been expressed as dualities were compiled and assessed for thematic emphases. These topics fell largely under themes congruent with the Areas category from ILT, as seen in Figure 1 and Appendix N. However, two additional categories were identified beyond the “Five Powerful P’s” in ILT literature. These extra categories have been named Provisions and Priorities.
The research sub-questions were analyzed across all data sources, with strong examples of nearly every ILT component present. This widespread presence in a new environment for ILT research indicated a full reflection of ILT in response to the primary research question, “What does leadership look like through the lens of Invitational Leadership Theory in three Cooperative Baptist Fellowship affiliated churches?” However, while the experience of Baptist leaders does seem to reflect ILT as a whole, there were additional factors identified that were not present in previous versions of ILT. Three significant elements were present for churches that have not been adequately captured in ILT: (a) theology; (b) autonomy; and (c) positive role inversion. Discrepancies, additions, and synthesis of the reviewed literature follow in Chapter 6.
CHAPTER SIX: CONCLUSIONS, DISCUSSION AND RECOMMENDATIONS

This qualitative case study centered on the following research question: “What does leadership look like through the lens of Invitational Leadership Theory in three Cooperative Baptist Fellowship affiliated churches?” To address this question, semi-structured interviews and participant observation were utilized to engage and document leader experiences. While the nine leaders who were selected for this study were identified through three churches that affiliate with the Cooperative Baptist Fellowship, their actual experience encompassed nearly thirty Baptist churches across the southeastern region of the United States. This broad base of experience has provided rich data to investigate what ILT looks like in these Baptist churches.

The conclusions of this study indicate that nearly all of Invitational Leadership Theory is relevant to the work and environment of these Baptist churches; Baptist churches do reflect Invitational Leadership Theory. However, while all of the major ILT components were represented in the data from the churches, the converse was not true: Baptist leader experience did reflect ILT, but ILT does not fully reflect Baptist leader experience. This chapter includes discussion and explanations drawn from the data to support this conclusion, as well as recommendations for further research. First, three conceptual conclusions from the study will be addressed: (1) theological understanding, (2) autonomy of the believer and the church, and (3) positive role inversion. Second, leadership and learning theories introduced in the literature review will be discussed. Third, a revised conceptual map of ILT for use in churches is presented and discussed (see Appendix O). These differences need not deter
church leaders from using the ILT literature, but are presented as reference points to properly interpret existing ILT for the church.

Conclusions

The conclusions of this study indicate that nearly all of Invitational Leadership Theory is relevant to the work and environment of Baptist churches. Literature identifies six major elements of ILT, all of which were found present in this case study. Self concept theory, one of the four Foundations had very little supportive thought or terminology within the data and has been replaced with the very prominent theological premise for connection. The exclusion of self concept theory is somewhat tempered, as the purpose for its ILT inclusion was the acknowledgement of individual worth. Individual worth, and the individual’s perception of their ability to contribute to their surrounding, is similar also to what Bandura called self efficacy (2004). This justification for engagement does have parallels within a theological worldview, with acknowledgement that the *whys* of engagement are more different than the *whats* when spanning theological and secular understandings of self. Therefore the resulting practical expectations are very similar, expecting organizational realities to reflect the significance of all participants, but the source of efficacy is intrinsic in a secular view, and gifted from the Creator God in a theistic view.

While nearly all of the ILT elements were represented in the data from the churches, there were priorities for the churches that were absent or underrepresented in current literature of ILT. While ILT was reflected within the experience of Baptist leaders, the Baptist leader’s experience was not fully represented in ILT. Three additional viewpoints will be discussed: theological understandings, organizational structures and the instability of
roles. These viewpoints for understanding were significant to Baptist leaders, yet they had no parallel in ILT. Figure 10 represents these church specific issues extending beyond current ILT conceptions.

**Figure 10**
*Concepts not previously represented in ILT that are relevant to churches.*

Discussion of these three additional viewpoints for belief and praxis will begin with theological understanding

**Theological understanding.**

The exercise of theological faith underpins all the church does. This theological grounding changes the way ILT can be used in two ways. The first will be termed ‘lower order’, and it is the actual language and terminology of the church. Using the term ‘lower’ does not intend less importance, but rather tangibility and practicality. The language of
schools is simply not the same as that of churches. In the literature, existing surveys, assessments, and models for ILT, school jargon is used. There are no principals in church, and there are no deacons in school. For these tools to be readily accepted, they will need to be adapted for appropriate language.

What will be termed a ‘higher order’ difference is the theological understanding of church participants. ‘Higher order’ is phrased to convey the complexity and intangible nature of this distinction, rather than its actual importance to the believers. The theological premise for gathering is a very different purpose, and accountability lies not only with the human community but with the Godhead. Notably, in the Foundation area of self concept, this theological base changes the derivation, the source of self efficacy. Oversimplified, but relevant, consider these justifications for personal value:

i. Humanist philosophy says everyone matters, because they do;

ii. Theistic philosophy says everyone matters because a creator God made them; and

iii. Christian theology says everyone matters because God redeemed them through Jesus’ life, death and resurrection.

This Christological understanding brought with it a pattern of attributing causality, meaning, and significance to God, often referred to as “Calling” by participants. The stories regarding their public professions of faith were powerful and personal. The theological foundation did not solve all the daily struggles and decisions for these leaders, as captured in the multitude of conundrums evident in the versus coding. But as a key Foundation category, this approach to life could not be minimized or excluded.
**Autonomy of the Believer and the Church.**

“Whatever disadvantages there are…the overriding advantage is that we are autonomous. We get to do in the church how we want to do it, and how God leads us to do it. And I believe wholeheartedly in that” (EBJH). Just as role inversion takes the understanding of every individual to a magnified practical expression in the church compared to a similar expression in a school, the autonomy of a Baptist church creates a different dynamic organizationally than a school. Olivia Smith pointed out, “You know Baptist churches all function differently don’t you?” As Baptist churches are financially and theologically independent of one another, this introduces a dynamic within the church that is unlike traditional K-12 schools, where most ILT research is based. Independent organizations, like the Baptist church, have outside affiliations and structures that they can reference, but they are not bound to them. This introduces an idea I will call the ‘microcosm effect’. The microcosm effect brings about differences in function, structure, and understanding based in all factors present at all times. Consider if the full school system that makes a local school - having the students, teachers, principals, school board, state legislature, federal regulators, and the voting populace were on one campus interacting with each other regularly. The church is a microcosm of that full, multilayered reality. In contrast, most modern, Western, public schools do not establish individual priorities or establish primary funding. For example, a local school has most priorities and funding established for them by the local, state and federal authorities. Autonomous churches are not implementing externally established goals with externally controlled resources.
Autonomy extends to the individuals involved with Baptist churches as well. Priesthood of the believer indoctrinates the expectation that every believer has full access to God. This was discussed as being functionally troublesome by Ingram, but the lack of obligation to the church and ordained ministers changes the relationship to one of choice rather than exclusion. The autonomy across churches and individuals necessitates two additional Areas introduced in Chapter 5; Priorities and Provisions. These new Areas are necessary for organizational sustainability.

Provisions are resources. Examples would be time, money, energy, enthusiasm, Spiritual gifts, emotional capacity, and other forms of capital. Roger Alderson stated the need here strongly, “We spend [an] enormous amount of capital…spiritual capital, mental and emotional capital, certainly financial capital.” Priorities can be thought of like direction. This new Area would include vision, mission, purpose, and goals for the group and for the individuals. The importance of share Priorities is made evident by Sarah Reed: “a group in our church… They held leadership roles, they were enthusiastic, they gave, they had wonderful leaders, but then their idea of what they thought the future of this church should be was different from the majority of people in our church.”

The addition of these two important Areas reflects the ongoing need for churches to discern, prioritize, communicate, fund, build, and implement their main reasons for existing. Two participants mentioned leaving previous churches because the churches did not prioritize children’s ministry during a key developmental time for their families. Priorities and Provisions are critical for the Areas category.
Positive role instability/inversion.

The seed of role instability can be found in ILT literature were education is presented as a cooperative activity where the student becomes the teacher (Purkey & Stanley, 1994). This concept also builds on what Mulej, et.al. call “mutual influence” in their description of systemic thinking (2003). The field of adult education is particularly aware of paradigms for learning that extend past a metaphorical ‘sit at the feet of the master’ realities. However, the depth with which the church and its leaders deal with this reality is well beyond the traditional school setting, and functionally more pervasive than formal adult education settings. To clarify the subject at hand, role instability does not mean people quit, or get pushed out of a formal leadership position. In fact, the instability occurs within, and sometimes despite, the formal or recognized structure of the organization. What is intended here is an awareness that people, and leaders, change positions within the larger system fluidly, across situations, time, and needs.

This topic may be captured well by the use of a metaphor. Consider the traditional roles found on a large cruise ship: common designations would include captain, crew, and passengers. If this metaphor were linked to a traditional school, especially a K-12 setting, consistent comparisons could be drawn between the captain and the principal, the crew and the teachers, and the passengers and the students. In fairness to schools, there would probably be more role instability in a classroom than there would between a ticket holding passenger and a crew member on a ship. But, consider this as a relevant point for using ILT in churches; while the roles can be compared structurally in a church (pilot is the pastor, crew is
the committees, passengers are congregation as a whole), the practice is phenomenally more jumbled. Table 20 takes a few layers of this metaphor and depicts them graphically.

Table 20
Metaphor grid demonstrating role instability

<table>
<thead>
<tr>
<th>Setting</th>
<th>Captain</th>
<th>Crew</th>
<th>Passenger/Benefactor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Church</td>
<td>Pastor</td>
<td>Committees</td>
<td>Congregants</td>
</tr>
<tr>
<td>Church</td>
<td>Christ as Head of the Church</td>
<td>Congregation</td>
<td>World</td>
</tr>
<tr>
<td>Committee</td>
<td>Committee chair</td>
<td>Pastor/staff</td>
<td>Congregants</td>
</tr>
<tr>
<td>Worship</td>
<td>Pastor/staff</td>
<td>Congregation</td>
<td>God/Christ</td>
</tr>
</tbody>
</table>

Role inversion resonates with Jesus’ teaching that “the last shall be first, first shall be last” and “unless you change and become like little children, you will never enter the kingdom of heaven (Matthew 20:16, NIV; Matthew 18:3, NIV). An expectation of humility and flexibility allows for shifting titles and roles. Examples in the church’s practice are seen as adults alternately teach, and are taught, in the various programs of the church. Teaching peers in one setting, and learning from them in another, captures mutual influence in formal structures. Sometimes the formal structures do not reflect the mutual influence, as evidenced by a Rhonda Walker story. Her Sunday School teachers were active with visiting and caretaking of the community in addition to the actual lessons they provided weekly. These teachers had a crisis, and the class inverted the roles – teaching in their absence and caring for the couple, including “enough meals in the freezer for six months.” The formal structure did not recognize this activity at all. The official church listing would still have shown the original couple as the ‘leaders’.
Taking the concept theologically, there is role inversion from ancient understandings of approaching God. ‘Priesthood of the believer’ is a Protestant doctrine that supports an individual’s capacity to relate directly to the Godhead, without an intermediary such as a priest (Pinson, 2010). Citing clergy licensure and ordination as designation of special status, ability, or privilege, Ingram contends that there are several layers of complexity to this particular role ambiguity between clergy and congregant. He comments, “at the theoretical level, democracy implies equality…in its most radical form, this doctrine denies any special status or function of the clergy” (1985, p. 122). Clearly there is a distinction of task, responsibility, and ability among the clergy in this case, yet the role instability exists as one church included in its weekly bulletin “every member a minister.” This idea of role inversion was the main concept driving the need to rework the Dimensions category.

**Discussion of Leadership Theory**

Chapter Two took three main areas of literature to establish the theoretical relevance of Invitational Learning Theory as it applied to Baptist churches. An overview of leadership theory was presented to highlight a progression across theoretical constructs that moved from the individual leader, the followers involved, both leaders and followers, the various situations and influences, the actual outcomes generated, and a holistic viewpoint from a systems perspective. The second literature areas overviewed relevant educational theory as it applies to churches, especially relevant to adults and their approach to church participation and leadership. The third literature area dealt specifically with ILT, giving a brief history of its roots as Invitational Education and the main categories of Foundations, Assumptions, Dimensions, Areas, Outcomes, and Conflict. These three literature areas form the basis for
discussion relevant to the case study involving nine leaders from Cooperative Baptist Fellowship affiliated churches.

Leader focused theories introduced in Chapter Two included trait, skills, and style oriented perspectives. All three of these viewpoints were represented in the statements of the interviewees, and were observed by the researcher during contextual engagement. Trait theory holds an interesting place in modern thinking, as charisma, intelligence and good looks still play a part in leadership dynamics, but fewer people hold these elements to be “innate”, or totally independent of situations (Northouse, 2010). This perspective took on an interesting theological aspect with the inclusion of spiritual gifts. Roger Alderson commented, “Church leaders are different in that they have been granted by the Spirit of God certain spiritual gifts that equip them to, to do certain things.” Sarah Reed spoke of “gifted” writers, and Jimmy Harrow described one element of his work as “pastoral care, and I realize that every pastor can’t do that. This is how God uniquely gifted me to be able to serve his people in this church.” While this faith based understanding of gifts does not match current use of the term ‘innate’, it does speak to something that is not necessarily developed, or even attainable simply by choice or intention.

Skills were clearly relevant in the experience of Baptist leaders, shown in positive references to highly skilled leaders, and negative references to “lackluster” leaders. The organizational need for competence was expressed for both vocational and volunteer leaders. A conflict of priorities was occasionally referenced in the interviews, as stories of displeasure over unskilled leaders were hard to reconcile with a strong intrinsic valuation of that leader as a person. How could they judge another as inept, and hold a theological understanding of
them as valuable? It was not simple to separate skills from perception of worth. This supports the validity of self concept and perceptual theory as foundations of ILT, as awareness of how people are viewed and view themselves matters in the engagement and outcomes. As Olivia said, “Sometimes you can’t fire who you didn’t hire!”

Style theory has broad support in the experience of Baptist leaders. Several stories relayed interviewee’s process of finding where they were comfortable working in the church, and ‘fit’ best. Dr. Bob Pollard described three roles of the pastor as preacher/teacher, caregiver, and administration. His description of his vocational journey was one of clarifying which of these roles matched his preferred style of engagement, and matching that preference to a church that needed them in the same balance. He could stretch his styles when needed, but could not sustain performance or satisfaction when a different style was needed.

Style theorists have presented varying categories of styles; French and Raven proposed four styles, Yukl and Tracey presented nine, and Goleman presented six (1959, 1992, 2000). Goleman posits that a leader actually exercises power and influence across several of the available styles, given their capacities and needs. A flexible approach such as this begins to show some of the constructs from situational leadership. One story from Bob’s experiences highlights this type of style and situation. He spoke frequently of being a servant leader, and preferring a highly collaborative method to make decisions. Yet, he told of a time when he served a large, highly structured church that did not want to take the time needed to get nearly a thousand people to share individual concerns. He would adapt his style preference only so far, and so many times, before he felt the need to find another church, a church that fit his preferred style better.
**Follower focused.**

As a vast majority of the data for this study was generated in conversation with formally identified leaders within the churches, it stands to reason that a leader focused view would surface. Especially as the participant observations did not allow for wide engagement with positional ‘followers’. However, the identified leaders consistently posited follower focused justification for their actions. Transformational theory elements were present, notably the process of meaning making through reflection. Even more prominent were the elements of servant leadership theory, akin to Robert Greenleaf’s iteration. Every interview had the concept, and the word, ‘servant’ as justification and purpose for leadership roles.

**Leader and follower focused.**

Kouzes and Posner’s Five Practices for leaders are characterized in Chapter Three as a theory that takes the leader and the follower perspective into primary consideration. Three of the practices are primarily built within the leader’s perspective, and two practices take the development of the follower as its primary motive. Characterizing this as a leader and follower focused theory continues to show the progression of scope needed to reach a systemic view intrinsic to ILT. While some of the concepts overlap with ILT, the church interviews actually utilized terminology more in line with Kouzes and Posner than Purkey, Schmidt, Novak, and Siegel (2002, 1991, 1990, 1996, 2003). “Modeling” the way, “inspiration”, and appreciation for the “heart” or spirit, fell especially within the purview of Kouzes and Posner. One particular element that leans toward the leader side of the equation was the list of characteristics followers desired. Table 5.2 presented a non-ordered list of characteristics found within the data for Baptist leaders. This list attempts to break out the
needed components for a leader’s effectiveness. From the follower side, it was profound the
level of importance that mentors, models, had on the participants learning how to be leaders
themselves. The leaders had learned how to lead through books, classes, experience, and
mentorships, but the consistent theme across vocational and lay leaders was that they had
learned the most effectively, in ways they continued to appreciate the greatest, through
mentors. One individual who had “shown them the ropes” relevant to tasks, style, and
expectations of their current role. Without this mentor position, they faced “trial by fire”
(HPRW).

**Transaction focused.**

Transactional theories look specifically at the actual interaction and dynamics
between participants. Theories like LMX theory focus on a very narrow definition of
interaction, considering the actual dynamic between every pairing of participants, in a
mindboggling array of one on one interactions. This viewpoint is certainly at work in the
leader experiences, but it leaves too much out of the communal reality of church experience.
Community and family were very significant in the open and in vivo coding analysis, and
draw practical attention away from theories like this. A richer expression of contagious
emotion in groups such as Goleman, Boyatzis & McKee describe, and the constancy of
triangular connections present in Friedman’s presentation of Family Systems Theory are

**Setting focused.**

The setting focused theories introduced in Chapter Two included Blanchard’s
*Situational Leadership*, Schein’s *Organizational Culture and Leadership*, and Senge’s *The
Over characterizing these, there is an acknowledgement that the situation, the context, the climate, and the culture surrounding a given leader are what determine success. To contrast their attention to setting with trait theory, many researchers at the early part of the twentieth century looked for the one or two, or three individual traits that consistently made a good leader independent of setting (Northouse, 2010). Setting focused theories turn the attention to what is needed by the context, the focus or skills of leaders and followers are only relevant given the needs and purposes of the environment. Three specific settings that altered leadership expectations were identified in the data as good examples: an arsonist put a church into crisis mode, a new hire put a pastor in a honeymoon like period of high hopes and expectations, and a leader had to abandon a team of volunteers due to an emergency appendectomy. The setting drove the needs, skills, and focus that were relevant in the end analysis, so this perspective definitely can inform the work of the church.

*Outcome focused.*

Northouse describes path goal theories as outcome oriented, describing a leaders task as removing obstacle in achieving those outcomes (2010). Following an arson attack that destroyed the physical plant of the church, pastor Bob Pollard described a very outcome oriented reaction by the church:

The leadership part of that was to see how the people in positions of leadership within the congregation put aside that which prevented us from moving forward…we’ve got to put aside these things that often hinder us from moving forward and make some decisions…immediately…Good solid folks that had been there for years rose to the occasion and said “This is what we need to do.”
Path-goal, and expectancy theory address motivation seen in this story toward a particular result, rebuilding the structure, that they viewed as achievable. An outcome oriented understanding of leadership has its place in the church, but was not pervasive in this case. 

**System focused.**

Systems theory seeks to provide an all inclusive view of a given phenomena, acknowledging a whole system, not a given unit. Bowen applied systems theory to his work with schizophrenia patients. He started with the premise that just looking at a schizophrenic patient would not explain their behavior or experience of reality. Bowen ‘widened the lens’ to include the parents, the siblings, even multigenerational realities that came to bear on the identified schizophrenic patient. Just as Bowen’s Family Systems Theory takes a wider lens, ILT is intriguing in part because it is a systemic understanding of organizational leadership. It includes elements of all five types of leadership theories listed in Table 3. Traits and skills are found in Areas of work (People have to develop them), as well as Assumptions (Respect is sometime founded in competence). Beliefs expressed in the Foundations drive functional choices such as the Policies. Path-goal and Expectancy theories have parallels in Optimism and Inspiration. Working with conceptual maps is one way to reduce the philosophically sound intentions of “everything matters” and “complexity” from systems thinking to the praxis of teaching, living, adapting and improving the systemic organizations and lives we lead (Purkey, 2003; Mulej, et.al., 2003).

**Discussion of the Church as a Learning System**

The data resolutely established these Baptist leaders within a learning centered system. Matching Jesus’ Biblical direction to “make disciples” with McKenzie’s
presentation of meaning making as adult religious education’s purpose, gives definition to
the church as a place for education.

Experiential learning theory, social learning theory, and affective learning theory
have the most potential for hands on application for the interviewed leaders. These theories
each take a crucial element for incorporation of learning into consideration that stands to
benefit practically in conjunction with and understanding of ILT. Experiential learning theory
may bring a clearer functional combination of Process, People and Place from the Area
category. Mission trips were frequently mentioned as experiential learning exercises that
combined out of the ordinary experiences that brought about learning at a much deeper level
than expected. As Olivia mentioned, their team was exposed to realities that had been
described to them verbally, but the team could not really learn a tropical culture cooking style
until they stood there with the women cooking in earthen mounds with an electric stove
sitting unused in the nearby house.

Social cognitive theory’s understanding of modeling as a primary development tool
was supported within this data. Drawing from the Dimensions category of ILT, the ways
leaders were engaged was found to vary by method. When asked how they learned to lead, it
was nearly unanimous that each leader had gotten the greatest benefit not from books, not
from opportunity and experience, not from trial and error, but from a mentor. Overwhelming
support for a one on one connection with someone doing a similar job was found in content,
language used, emphasis, extracurricular invitations, personal interaction, and reports of
appreciation.
Variety in where, and how, people learned became evident. Activities where intellectual understanding precedes application, like reading, seminars, and retreats, were the most accessible ways to learn. Sunday School participation had the highest frequency of involvement. On the job training was where the most practical experience was learned about leadership. A mentor, or coach, or friend or pastor, or preceding committee member, or team leader that took interest and worked with these nine leaders was by far the most effective way to learn. This knowledge, in combination with the systemic understanding of ILT, yokes understanding to practice in the further development of leaders in the church.

**Literature review conversation summary.**

Baptist churches were highly committed to the principles and praxis needed to function as learning systems. Their programs, terminology, democratic ethos and expectation of participants as “disciples” and “learners” were woven deeply into organizational realities. As education matters, the issue of educating leaders becomes relevant to accomplish that learning system. In the leadership literature review, a progression of theories was presented which moved through the individual leader, the follower’s perspective, the situations, the outcomes, to a full systemic view of leader success. ILT stands as a systemic expression which takes each of these foci and draws together the benefits of these narrowly focused theories into a systemic understanding. Foundations and Places relate closely to Setting focused theories. Assumptions relate closely to traits and skills within Leader/Follower and Transactional focused theories. Dimensions relates closely to Leader focused theories. Level and Products combine to relate close to Outcome and Style focused theories. The Six “C’s” of Conflict management are systemic in the intent to merge multiple people, resources,
settings, and outcomes in a healthy cycle of engagement that is both honest and appropriate.

Taken together, ILT values an ‘everything matters’ philosophy, while providing specific groupings for organizational understanding and improvement.

**Invitational Leadership Theory Revision**

A revised learning tool was developed as an outcome of the literature review, data collection, analysis and conclusions. Available below as Figure 12, and repeated at the end of the document as Appendix O, the visual summary of ILT components offers a descriptive, and possibly prescriptive, leadership development tool for churches which draws on the previous work of Invitational Leadership Theory. Four of the major categories of ILT (Foundations, Assumptions, Dimensions, Areas, Outcomes and Conflict) were adapted to better represent the church environment. Comparing the revised version, Figure 12, to earlier versions, Figure 1, the specific alterations are:

1. A single Foundation change: Self concept theory is replaced by a theological understanding of self-efficacy,

2. Two assumptions which were mildly present, Optimism and Intentionality, have been replaced by very strong concepts of Vision and Inspiration.

3. A reconfiguration of the Dimensions category altering the self/other, personal/professional rubric to a four item list of Spiritual, Intellectual, Physical, and Community.

4. Two new Areas have been added: Priorities and Provisions.

These nine changes are distinguished in the Revised ILT, Figure 12, by yellow highlights, as well as dashed lines around their respective text boxes. To provide support for the inclusion
of these ideas, it may help to see where these changes come from. Figure 11, below, takes Figure 10, from above, and draws direct trajectories from the identified conclusions to three categories of affiliated revisions in the ILT conceptual map. These three categories represent seven of the changes.

Figure 11: Identified church concepts provide ILT revisions

The modified Venn diagram of Figures 10 and 11 depict the three key findings from this study that were present for churches, but were not identified in ILT. To incorporate these findings into the conceptual map, the changes mentioned above were included in Figure 12 (repeated in Appendix O). The theological understanding for purpose and task for these churches was pervasive. It defined and undergirded conversation, priorities, and choices at the individual and collective levels. Incorporating this reality into the Foundations, indeed the
first Foundation, conveys both its importance and its breadth of impact. The category has been referred to as self-concept within most ILT literature, a concept not totally abandoned with the theological inclusion. The Revised ILT actually preserves the concept of self awareness and capability similar to the original ILT. Bandura’s term of self efficacy is used because it is more focused on the individual’s capacity for effectiveness (2001). Pairing a theological understanding, especially a theology based on a divine creator, does not take away the important reality of how the individual views and understands self. However, the theological premise brings with it an understanding that the self originates from, and is connected to, a higher power.

The autonomy of believers and the organizational church from outside entities became strongly apparent in the interviews, and subsequent analysis. As a vocational minister, ‘priesthood of the believer’ was part of my existing definition of faith. But I was initially surprised at its inclusion in several of the interviews. This interesting tension of having vocational ministers, yet viewing them as theologically un-necessary was highlighted by Ingram, and actually conveys the flip side of autonomy – even though a person or group is not obligated to relate or affiliate with another person, group or deity, there are strong benefits to doing so. The participants were pleasantly defiant of expectations that they had to be in lock step, and even expressed hopes that a wider range of views could be espoused by fellow congregants. The functional side of this autonomy is where Provisions and Priorities come to the forefront. Alluding even to the democratic ethos Foundation, when there is autonomy, the unions ascribed to must be negotiated and established collectively. Without
establishing the goals, or Priorities, and means to reach them, Provisions, there is no collective reality.

Positive role instability has driven the reworking of all four Dimension categories. While the original Dimensions were vaguely apparent in the data, the terminology regarding personal and professional realms is much less meaningful in spiritual and church work. Clear distinctions of leader/follower, student/teacher, even what is internal and external are much more fluid from a spiritual standpoint. The originally worded research sub question of “How are leaders developed?” seemed insufficient for this category. “How are leaders encouraged to enrich their lives?” became a question that could be used as a standalone category for church participants. The four revised categories span facets of private and corporate existence, and focus those willing to be disciples tangible constructs to assess in their lives and work.

The last two changes were not as comprehensive, so they are not exactly like the three key findings represented in Figures 10 and 11. Vision and Inspiration have replaced Optimism and Intentionality in the revised Assumptions list seen in Figure 12. Vision was used in the data as both a noun, something to have or work towards, and also a verb, something to do, like exercise. These different expressions were valuable to leaders, followers, and could be used to describe relational aspects of participants, along the order of the colloquial ‘seeing things alike.’ While optimism was certainly observed and present in the data, it was not overtly expressed as a requirement the way vision was. It might be said that it was more important for these leaders to see what is coming accurately, than to see it optimistically.
Intentionality is a favorite concept for ILT, but Inspiration was voiced by the participants much more strongly as a requirement for leadership (Purkey, 1991; Purkey & Novak, 1988; Steyn, 2007). It might even be worth considering intentionality as a Foundation rather than an Assumption, in that it speaks as much to an approach, or belief, than it does to something that happens between participants. Arguing that individuals and groups have to be intentional to realize their goals is not contrary to church realities at all. But it did not capture the language and shared conversation of the churches in this case. Inspiration fit that bill much better, at a ‘God inspires the church’ level, as well as a ‘leaders inspire others’ level. This inspiration was a required component of intentional action, yielding more ownership, motivation, and engagement among participants.
Figure 12: Revised Invitational Leadership Theory, for use in churches.
Summary of Conclusions

Leadership experience within Baptist churches does reflect Invitational Leadership Theory in a very broad and complimentary way. ILT forms an excellent basis for understanding, assessing, and developing learning organizations that hold high individual worth as the building blocks for organizational success. Carrying the reflection metaphor one step further, it must be clarified that while ILT is reflected in Baptist leader’s experience, the mirror is a tad wavy with some omissions where the silver has chipped away. ILT, as previously constructed, is a strong tool to assess and convey organizational realities, but it needs to be “baptized” to work well in, and with, Baptist churches.

Appendix N presents pre-existing ILT which can certainly be used as a tool for a shared, democratic, assessment of organizational culture in Baptist churches. Key improvements for using this structure have been implemented in the revised conceptual map presented as Appendix O. The revised version has nine total changes, here listed by significance. First, the importance of a theological, specifically Christological, understanding of belief undergirds leader experience in Baptist churches. Second and third, the additions of Priorities and Provisions to the Areas category are essential to represent the ongoing work of an autonomous organization. The previous Dimensions terminology of self/others, and personal/professional were relevant, but they were not the priority for the churches. Instead, changes four through seven are the new categories of Spiritual, Intellectual, Physical, and Community for leader development within the Dimensions category. Replacing Optimism and Intentionality with Vision and Inspiration in the Assumptions column constitute the eighth and ninth changes.
Understanding categories within the original and revised ILT structure will aid implementation. Foundations are a way to talk about the guiding principles and cultural expectations for the organization. Dimensions allow for individual development. Areas guide organizational and relational development. The Levels and Outcomes are good barometers for Style of leadership, and the Conflict management progression through the ‘Six C’s’ prevents over and under engagement of difficult issues. If leaders and churches are patient in discovering the breadth of ILT, few other leadership tools can compete with the depth of application.

**Recommendations for Future Research**

The following six suggestions for further research fall into three categories. The first two recommendations propose repeating a similar type of case study, suggesting a broader sample and longitudinal adjustments for data collection. Recommendations Three and Four suggest studies might make use of existing, predominantly quantitative, ILT research tools. This quantitative work may provide a data set that could be compared more directly to previous ILT research, but may need contextual adjustments prior to implementation. Recommendations #5 and 6 connect ILT to outside models and worldviews, specifically critical theory and style theory of leadership.

1. A study similar to this one, with broader parameters to increase validity:
   a. More people from each church would capture a wider range of ages, commitment levels, and spiritual development.
   b. More documents and observations from each church would increase the trustworthiness by giving more reference points.
c. A wider range of church settings might reflect ILT differently. Church size, Baptist churches not affiliated with CBF, denominations other than Baptists, and leadership gender are worth exploring further.

2. A longitudinal case study could follow a particular leader or a church as it seeks to learn and integrate ILT. The Invitational Helix, shown in Appendix L, could form the basis for a study of that nature.

3. A study comparing Invitational Quotient scores of key church leaders to satisfaction and effectiveness metrics could be structured similar to Egley’s work found in the 2003 article, ‘Invitational Leadership: Does it make a difference?’ in the Journal of Invitational Theory and Practice, 9, 57-70.

4. Use quantitative ILT assessment tools that already exist, such as the Invitational Teaching Survey, to get a picture of ILT in churches (Amos, 1985). This may function as two recommendations; first to rewrite existing tools, and second to validate and build a data set using them.

5. Take a critical theory lens and do an assessment of the praxis of Levels of Invitation (invitation through dis-invitation) from the vantage point of a possible new Area – Privilege (Cervero & Wilson, 2006).

6. Look at ILT not as a singular goal, but as a possible style within the style theories of leadership (see Appendix M).

This dissertation provides an initial step for assessing the usefulness of Invitational Leadership Theory in the life and work of Baptist churches. ILT does offer Baptist churches a viable structure for organizational assessment and leadership development. Acknowledging
differences of purpose and scope between churches and schools does not preclude further exploration and application of ILT among communities of faith. To the contrary, the research recommendations above would expand the understanding and usefulness of ILT across many organizations.

**Concluding Comments**

This study found that Invitational Leadership Theory is strongly reflected in the experience and practice of Baptist church leaders affiliated with the Cooperative Baptist Fellowship. Three key differences inform the understanding of leadership needs for a church compared to a school; positive role instability, individual and the organizational autonomy, and the theological basis for belief and practice. From these three key differences, one Foundation, two Assumptions, all four Dimensions, and two Areas have been changed from the original conceptual map of ILT. Appendix K diagrams these changes by (a) clarifying a theological basis for self efficacy in the Foundations, (b) Vision and Inspiration replace Optimism and Intentionality as Assumptions, (c) Spiritual, Intellectual, Physical and Community replace all four of the original Dimensions, and (d) Priorities and Provisions are added to the Areas category.

The shared premise of *invitation* between ILT and Baptist expressions of faith proved consistent and worth developing further. The concept of *living* invitationally focused a strong positive regard for people toward the behavior of leaders and their organizations. The modified ILT is offered as a tool for understanding and developing leadership in churches that seek to bring the practice of their faith ever closer in line with the intention of their faith.
REFERENCES


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APPENDICES
Appendix A: Summary of Research Settings for Invitational Theory

Research Settings for Invitational Theory

<table>
<thead>
<tr>
<th>Setting</th>
<th>Subject</th>
<th>Prevalence</th>
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<tbody>
<tr>
<td>Schools</td>
<td>The school as a collective</td>
<td>30</td>
</tr>
<tr>
<td></td>
<td>Teachers/Administrators</td>
<td>22</td>
</tr>
<tr>
<td></td>
<td>Students</td>
<td>13</td>
</tr>
<tr>
<td></td>
<td><strong>Total:</strong></td>
<td><strong>65</strong></td>
</tr>
<tr>
<td>Counseling</td>
<td>Psychological/Therapeutic</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Behavior/skills</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td><strong>Total:</strong></td>
<td><strong>7</strong></td>
</tr>
<tr>
<td>Community</td>
<td>Profession of Social Work</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Social behavior</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td><strong>Total:</strong></td>
<td><strong>3</strong></td>
</tr>
<tr>
<td>E-learning</td>
<td>Virtual community</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td><strong>Total:</strong></td>
<td><strong>1</strong></td>
</tr>
<tr>
<td>Abstraction</td>
<td>Theoretical</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td><strong>Total:</strong></td>
<td><strong>5</strong></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>81</strong></td>
</tr>
</tbody>
</table>

(Purkey & Stanley, 2001; Journal of Invitational Theory and Practice, 2002-2010)
Appendix B: Letter Requesting Involvement

Dear Pastor X,

As an ordained minister who has served congregations full time, I am confident that you have a strong desire to serve your congregation in a meaningful and significant way. Over my twenty years of ministry, I have often struggled to find ways to describe and teach the components of a healthy church that will honor the concept of church as the body of Christ. My hope is to further the work and spirit of the church in accomplishing its mission. This search has led me back to school, and I am pursuing a doctorate in adult education.

I am exploring a leadership theory that is based in the concept of invitation. Too many times our churches are experienced by newcomers - and long time members - as disinviting, when a key theological premise is to welcome those who are part of our world, city, and family. As I enter the dissertation phase of my program, I am writing to ask you and your church to participate in my research.

This involvement would involve three levels:

1. Your personal involvement
   a. An interview lasting approximately 1.5-2 hours
   b. Aid in securing support from lay leadership who will be interviewed

2. Your church’s indirect involvement as worship services will be observed.

3. Two additional laypeople from your congregation, likely the Sunday School chair and either the deacon or church council chair will be asked to be interviewed as well for about 1.5-2 hours.

Common research steps which offer confidentiality will be assured in all published material through the use of collective and individual pseudonyms. If additional obfuscation is needed to protect identity while still presenting the material with integrity, a possible composite narrative may be formulated from several interviews.

I am happy to answer any questions you may have concerning your participation through email, regular mail, or phone conversations. I look forward to hearing from you.

(email omitted)
(phone number omitted)

In Christ,

Rev. Tyler Townsend
Appendix C: Participant Consent Form

North Carolina State University
INFORMED CONSENT FORM for RESEARCH
Title of Study: Baptist Congregational Leadership: A Case Study of Invitational Practice
Principal Investigator: Rev. Tyler Townsend  Faculty Sponsor: Dr. Ken Brinson

What are some general things you should know about research studies?
You are being asked to take part in a research study. Your participation in this study is voluntary. You have the right to be a part of this study, to choose not to participate or to stop participating at any time without penalty. The purpose of research studies is to gain a better understanding of a certain topic or issue. You are not guaranteed any personal benefits from being in a study. Research studies also may pose risks to those that participate. In this consent form you will find specific details about the research in which you are being asked to participate. If you do not understand something in this form it is your right to ask the researcher for clarification or more information. A copy of this consent form will be provided to you. If at any time you have questions about your participation, do not hesitate to contact the researcher(s) named above.

What is the purpose of this study?
W.W. Purkey has been a primary author of a general frame of reference for leadership and climate over his twenty five year career called Invitational Leadership Theory. His primary focus has been K-12 and higher education academic settings. This study is intended to document the leadership experience in Baptist churches and to assess Invitational Leadership Theory in a new setting, that of Baptist churches.

What will happen if you take part in the study?
If you agree to participate in this study as a layperson, you will be asked to meet with Rev. Townsend for a two hour interview. The interview will be held at a mutually agreed upon location that offers privacy so that you may answer questions freely. The interview will be scheduled at your convenience.

If you are clergy and agree to participate in this study, the interview process will be similar to that described above for a layperson. Additionally, you may be asked to help secure documents such as church covenants, newsletters, constitutions, bulletins, audio and transcribed copies of sermons (if available). Also, securing laypeople for interview purposes is asked of the clergy role.

Risks
There are no physical risks associated with this research. Should you find yourself extremely uncomfortable answering any of the interviewer’s questions, you are encouraged to ask to move on to another question or withdraw from the study if absolutely necessary.
Benefits
In addition to contributing to the scholarly research for leadership models, this study will further inform pastors, clergy, staff, and lay leaders how better to assess the many factors that contribute to organizational health and effectiveness.

Confidentiality
Data will be stored securely in a locked firebox in the principal investigator’s office, and on an encrypted external flash drive storage device. No reference will be made in oral or written reports which could link you to the study.
Your confidentiality will be maintained by the researcher. Only the researcher and possibly a transcriptionist will have access to the data from your interview(s) before your name is removed. You will receive a one page summary of your interview to review. Corrections or additions can be made within one week of the initial interview by telephone if you so choose. Data will be reported using “made up” names to maintain confidentiality, and any demographic information that could indirectly identify you will be masked so you can’t be identified. This data will be published in a doctoral dissertation for North Carolina State University. Additional possibilities exist for a journal article(s), conference proceeding(s), or work in the form of a book.

Compensation
You will not receive any monetary compensation for participating.

What if you have questions about this study?
If you have questions at any time about the study or the procedures, you may contact the researcher, Rev. Tyler Townsend, [address and phone number removed for publication].

What if you have questions about your rights as a research participant?
If you feel you have not been treated according to the descriptions in this form, or your rights as a participant in research have been violated during the course of this project, you may contact Deb Paxton, Regulatory Compliance Administrator, Box 7514, NCSU Campus (919/515-4514), or Joe Rabiega, IRB Coordinator, Box 7514, NCSU Campus (919/515-7515).

Consent To Participate
“I have read and understand the above information. I have received a copy of this form. I agree to participate in this study with the understanding that I may choose not to participate or to stop participating at any time without penalty or loss of benefits to which I am otherwise entitled.”

Subject's signature ___________________________ Date __________________

Investigator's signature _______________________ Date __________________
Appendix D: Participant Demographic Form

As part of the research process, it will help if you will answer the following questions. This will enable us to characterize some of the themes of interest based in a broader context of where they are lived. Thank you for your participation.

Name (once linked to a pseudonym, this page will be destroyed)___________________

1. Gender _______________
2. Age _______________
3. Length of time affiliated with this church _______________________________
   ___________________________________________________________________
   ___________________________________________________________________
5. Have you served as a leader with other Baptist churches? _________
6. If yes to #5, please indicate a total number of churches and any denominational background. __________________________________________________________
   ___________________________________________________________________
7. Please mark on the scale below how involved you perceive yourself to be at present in the whole organization:
   [_______________________________________________________________]
   Very involved       somewhat involved       not very involved
### Appendix E: Demographic Form Responses

<table>
<thead>
<tr>
<th>Church Affiliation</th>
<th>Name</th>
<th>Gender</th>
<th>Age</th>
<th>Years with church</th>
<th>Current leadership positions</th>
</tr>
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<tr>
<td>Edgetown Baptist</td>
<td>Jimmy Harrow</td>
<td>M</td>
<td>59</td>
<td>8</td>
<td>Pastor</td>
</tr>
<tr>
<td></td>
<td>Olivia Smith</td>
<td>F</td>
<td>66</td>
<td>20</td>
<td>Sunday School Director, Welcoming Chair</td>
</tr>
<tr>
<td></td>
<td>Corey Dunlevy</td>
<td>M</td>
<td>70</td>
<td>9.5</td>
<td>Moderator, Personnel Committee</td>
</tr>
<tr>
<td>Highland Park</td>
<td>Dr. Roger Alderson</td>
<td>M</td>
<td>53</td>
<td>15</td>
<td>Pastor</td>
</tr>
<tr>
<td></td>
<td>Sarah Reed</td>
<td>F</td>
<td>68</td>
<td>30</td>
<td>Co-chair of Education Committee</td>
</tr>
<tr>
<td></td>
<td>Rhonda Walker</td>
<td>F</td>
<td>48</td>
<td>4</td>
<td>Co-chair of Education Committee, Sunday School teacher 2nd grade</td>
</tr>
<tr>
<td>Mountain Crest</td>
<td>Dr. Bob Pollard</td>
<td>M</td>
<td>43</td>
<td>1</td>
<td>Pastor</td>
</tr>
<tr>
<td></td>
<td>Ben Wall</td>
<td>M</td>
<td>52</td>
<td>12</td>
<td>Chairman of Deacons, Building and Grounds</td>
</tr>
<tr>
<td></td>
<td>Sam Edger</td>
<td>M</td>
<td>37</td>
<td>5</td>
<td>Sunday School Director, Baptist Men Coordinator, KidPraise Volunteer, Church Council</td>
</tr>
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</table>
Appendix E: Demographic Form Responses (Continued)

<table>
<thead>
<tr>
<th>Church Affiliation</th>
<th>Name</th>
<th>Have you served as a leader with other Baptist churches?</th>
<th>If yes to Q5, indicate total number of churches</th>
<th>Please mark on the scale how involved you perceive yourself to be at present in the whole organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edgetown Baptist</td>
<td>Jimmy Harrow</td>
<td>Yes</td>
<td>4</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>Olivia Smith</td>
<td>Yes</td>
<td>2</td>
<td>8.5</td>
</tr>
<tr>
<td></td>
<td>Corey Dunlevy</td>
<td>Yes</td>
<td>4</td>
<td>9.5</td>
</tr>
<tr>
<td>Highland Park</td>
<td>Dr. Roger Alderson</td>
<td>Yes</td>
<td>4</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>Sarah Reed</td>
<td>Yes</td>
<td>3</td>
<td>9</td>
</tr>
<tr>
<td></td>
<td>Rhonda Walker</td>
<td>Yes</td>
<td>1</td>
<td>7.5</td>
</tr>
<tr>
<td>Mountain Crest</td>
<td>Dr. Bob Pollard</td>
<td>Yes</td>
<td>4</td>
<td>9.5</td>
</tr>
<tr>
<td></td>
<td>Ben Wall</td>
<td>No</td>
<td></td>
<td>9</td>
</tr>
<tr>
<td></td>
<td>Sam Edger</td>
<td>Yes</td>
<td>2</td>
<td>9.75</td>
</tr>
</tbody>
</table>
Appendix F: Interview Guide for Semi-Structured Interviews

Prior to the interview the Interviewer will distribute and receive the following from potential participants:
- Consent form
- Demographic Questionnaire

The Interviewer will bring the following to the initial interviews:
- Dual digital sound recorders
- Interview guide
- Consent forms
- Demographic questionnaire

During the Interview, the Interviewer will do the following:
- Greet participant
- Reintroduce topic briefly and explain interview procedures
- Answer any questions
- Confirm receipt of demographic questionnaire and signed consent form
- Explain that some questions may cause momentary discomfort or unhappiness and participants can refuse to answer any questions they perceive as embarrassing or threatening.
- Explain that the interviewer is interested in hearing about their personal experiences.
- Start recorders
- Conduct interview
- At the end of the interview thank participant and stop recorders

Interview questions:

1. Please tell me about yourself.
   - Where you grew up
   - Lifelong or adult convert to Christianity
   - Current family
   - Length of membership
   - Leadership roles

2. Please tell me about your church.
   - How is it organized?
   - How do people work together?
   - How would you describe the overall health of the church?
3. What kinds of ideas would you say your church is built on? Ideas or principals that, if they went away, your church would really not be what it is today… RQ1
   - How might a new person see these principles in the leaders? RQ4

4. How would you define or describe a leader?
   - Is a church leader any different than a leader in other settings?
   - What qualities matter most in a leader of this church? RQ2

5. Can you walk me through how you became a leader in this church? RQ3

6. For this next section, I am going to have you consider and respond to some statements. After each one, will you discuss how the church might reflect or refute these ideas? RQ1
   - People are able, valuable, and responsible and should be treated accordingly (adapted from Purkey & Stanley, 1991, p. 15).
   - Discipleship is a cooperative activity in which process is as important as product (adapted from Purkey & Stanley, 1991, p. 15).
   - Individuals possess relatively untapped potential in all areas of development (adapted from Purkey & Stanley, 1991, p. 15).
   - How people perceive your church matters as much as what can be observed. RQ1
   - A church’s shared health matches the health of its individual participants. RQ3

7. How do things get done around here? RQ 2,4,5

8. Please tell me about a time that you would consider satisfactory, or even excellent, leadership within the church? RQ 5
   - Did this impact how you viewed your self? RQ1
   - Did this impact how you viewed your church? RQ1
   - Can you think of ways to allow a repeat of this success? RQ 2,4,5

9. Can you tell me a story of a time that you would consider unsatisfactory leadership within the church? RQ 5,6
   - Did this impact how you viewed your self? RQ1
   - Did this impact how you viewed your church? RQ1
   - Can you think of ways to prevent a repeat of this RQ 2,4,5

10. Let’s shift a bit closer to your personal experience if we can… What are some of the ways you as a leader are able to influence this church? Where does the rubber hit the road for you personally?
    - How did you learn how to lead in this church? RQ 3,4
    - Are there ongoing expectations of leaders within this church? RQ 3,4
11. Is there any discrepancy between your view of yourself as a leader in the church, and what might be called the “ideal” leader? Could you talk about that? RQ 2,3,5

12. You have certainly been a part of churches and other groups that experience times of conflict or disagreement… will you share with me what happened? RQ6

13. Are there major advantages to the way Baptist churches function? Would you describe some disadvantages as well?

14. Are there additional stories or information that should be included to represent leadership in this church accurately?

15. Is there anything you wished I had asked that you would want to include?

----Thank you for participating in this study of leadership in Baptist churches!
Appendix G: Additional Theological Word Trees
Appendix G: Additional Theological Word Trees (continued)

And then have a subsequent associate pastor. We ended up calling me now, you're not Did, did that experience with felt like was a real find, call a new one, don't understand it but God's you ever thought that growing in the 50's and I feel like God is I tried to promote of do. This is before might not be of course, and uh in other night, what was he our, so far I've been the way they go about them ... it was an inreach to the ministry and he's decided that, that God like if one person of humorous, "no he orientation class and they a thing where we were in doing what you to be wherever Gods got it, I get it, I get it, I get it. You're calling me

! [ha ha] That will be yea whatever", but the third a pastor - it can be, chairing some of the and so I stuck with stuff. Just fat dumb folks that hadn't been in him here. He came and of course and that it our Baptist Men's group, after retirement. I understand for, did I do now, you're not calling to do something, I you're calling me now., mike, who had been the ministry. I just feel like now, not later. I get somebody if you didn't see the pastor, did that impact role and I heard visioning process. The intent their first pastor and ough to be in ministry. It us now, not later. And to the ministry and be. I said check on you... ministry? And he you to
Appendix G: Additional Theological Word Trees (continued)
Appendix H: Additional Community Word Trees

a sense, you know providing
along together very well. They
are very caring church, we
are taking
they'll take
as good a
B: It's a sense of '
being proactive and showing that
by as far as taking
not this fear...
and he
and I
they come somewhere,
not open and they
get me the freedom to
I'm not speaking about individual
like issues more than physical
love is one, genuine concern
me the freedom to care, of his life, and I
her. That's ministry, that's
impact here in my
have an understanding
in certain situations
oh, she's much better
that's who I am,
I've got to do
or 10:05. So
And when I say
do, sure, let me
for each other, they
got that together. "I'll,
I'll go up and
individual care also
we ought to
just take care of
my biological dad couldn't
of me. "If you
play those leadership roles
terrible maybe, but it's "
the expectation, all let's
the money and we'll
stuff. We continued
who are going
guy, leveled out and
that's how things are
taken
thing I dislike about the
was they would say "my
care, in leadership in that
in leadership in that area
let's just do it. Let's
never experienced that, does that
And that's another thing, that
Caring that they have been
I, I probably have more
also just take care of
compassion for one another,
I realize that every
love yourself. TT OK,
she's marvelous at that.

a sense, you know providing
along together very well. They
are very caring church, we
are taking
they'll take
as good a
B: It's a sense of '
being proactive and showing that
by as far as taking
not this fear...
and he
and I
they come somewhere,
not open and they
get me the freedom to
I'm not speaking about individual
like issues more than physical
love is one, genuine concern
me the freedom to care, of his life, and I
her. That's ministry, that's
impact here in my
have an understanding
in certain situations
oh, she's much better
that's who I am,
I've got to do
or 10:05. So
And when I say
do, sure, let me
for each other, they
got that together. "I'll,
I'll go up and
individual care also
we ought to
just take care of
my biological dad couldn't
of me. "If you
play those leadership roles
terrible maybe, but it's "
the expectation, all let's
the money and we'll
stuff. We continued
who are going
guy, leveled out and
that's how things are
taken
thing I dislike about the
was they would say "my
care, in leadership in that
in leadership in that area
let's just do it. Let's
never experienced that, does that
And that's another thing, that
Caring that they have been
I, I probably have more
also just take care of
compassion for one another,
I realize that every
love yourself. TT OK,
she's marvelous at that.

and everybody's fine with
making sure our children
all this myself. I'm
each other, you know.
A: Does
here up in the
Or even adult
it, "So it might
from there ". And
then everything is
me, "If you take
I'm not speaking
pastoral stuff. Then they
take care of this
,and it won't
that, "SR They have...
...And six days
the kids, get the
this community. As sum
us, he basically had
what you've been charged
role here than I do
that I am you know.
level they are of
that says, we're going

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Appendix I: Additional Priorities Word Trees
Appendix I: Additional Priorities Word Trees (continued)
Appendix K: Additional Interaction Style Word Trees
Appendix L: Invitational Helix:

A Systematic Guide for Individual and Organizational Development

(Purkey & Novak, 1993)
Appendix M: Invitational Leadership as a Possible Leadership Style

<table>
<thead>
<tr>
<th></th>
<th>Coercive</th>
<th>Authoritative</th>
<th>Affiliative</th>
<th>Democratic</th>
<th>Pacesetting</th>
<th>Coaching</th>
<th>Invitational</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The leaders modus operandi</strong></td>
<td>Demands immediate compliance</td>
<td>Mobilizes people toward a vision</td>
<td>Creates harmony and builds emotional bonds</td>
<td>Forges consensus through participation</td>
<td>Sets high standards for performance</td>
<td>Develops people for the future</td>
<td>Create a total environment that intentionally summons people to realize their potential (Purkey &amp; Stanley, 1991)</td>
</tr>
<tr>
<td><strong>Underlying emotional intelligence competencies</strong></td>
<td>Drive to achieve, initiative, self-control</td>
<td>Self confidence, empathy, change catalyst</td>
<td>Empathy, building relationships, communication</td>
<td>Collaboration, team leadership, communication</td>
<td>Conscientiousness, drive to achieve, initiative</td>
<td>Developing others, empathy, self awareness</td>
<td>Self confidence (efficacy), developing others, communication</td>
</tr>
<tr>
<td><strong>When the style works best</strong></td>
<td>In a crisis, to kick start a turnaround, or with a problem employees</td>
<td>When changes require a new vision, or when a clear direction is needed</td>
<td>To heal rifts in a team or to motivate people during stressful circumstances</td>
<td>To build buy-in or consensus, or to get input from valuable employees</td>
<td>To get quick results from a highly motivated and competent team</td>
<td>To help an employee improve performance or develop long term strengths</td>
<td>Process is as important as product (Purkey and Stanley, 1991)</td>
</tr>
<tr>
<td><strong>Overall impact on climate</strong></td>
<td>Negative</td>
<td>Most strongly positive</td>
<td>Positive</td>
<td>Positive</td>
<td>Negative</td>
<td>Positive</td>
<td>Positive</td>
</tr>
</tbody>
</table>

(Adapted from Goleman, 2000)
Appendix N: Invitational Leadership Theory overview, with dates of earliest inclusion in literature.

RSQ1: Foundations of Invitational Theory

RSQ2: Assumptions
- Trust 1988
- Respect 1988
- Optimism 1988
- Intentionality 1988
- Care 2005

RSQ3: Dimensions
- Self Personally 1988
- Others Personally 1988
- Self Professionally 1988
- Others Professionally 1988

RSQ4: Areas
- People 1988
- Places 1988
- Policies 1988
- Programs 1988
- Process 1990

RSQ5: 4+Levels and 2 Products=Outcomes
- The Plus Factor 1990 & 1991 only
- Level IV Intentionally Inviting 1981
- Level III Unintentionally Inviting 1981
- Level II Unintentionally Disinviting 1981
- Level I Intentionally Disinviting 1961

RSQ6: Six “C’s”
- Beneficial Presence 1991
- Lethal Presence 1991

1. Self-Concept Theory 1970
2. Perceptual Tradition 1988
3. Democratic Ethos (Novak, 2005)
4. Goal of Educational Living (Novak, 2005)

(Adapted from Purkey, 1991, p.2; Purkey & Novak, 1996; Novak, 2005; Townsend, 2012)
Appendix O: Invitational Leadership Theory, revised for use in churches.

Assumptions
- Trust
- Respect
- Vision
- Inspiration
- Care/Love

Dimensions
- Spiritual
- Intellectual
- Physical
- Community

Areas
- Priorities
- Provisions
- People
- Places
- Policies
- Programs
- Process

4+Levels and 2 Products=Outcomes
- The Plus Factor
- Level IV Intentionally Inviting
- Level III Unintentionally Inviting
- Level II Unintentionally Disinviting
- Level I Intentionally Disinviting

Six “C’s”
- Beneficial Presence 1991
- Lethal Presence 1991

Theology/Christological basis for self efficacy
- Perceptual Tradition
- Democratic Ethos

Goal of Educational Living
- (Adapted from Purkey, 1991, p.2; Purkey & Novak, 1996; Novak, 2005; Townsend, 2012)